

Plug the Revenue Leaks

The Small Business AI Playbook to Automate Growth & Drive Revenue

Who am I?

A little bit about me..

- **Product Manager, LawDepot**
- IT & Business System Lead, Edmonton Unlimited.
- Tech consulting — Advising big firm on tech solution & system architecture.
- Built my own startup; Worked for startups.
- ***All this to say, I'm well versed in the art of "Stopping the quiet bleed", and/or this idea of "Plugging the revenue leaks".***



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Agenda

What are we going to cover today?

01. Central Ideas

02. Universal Business Activities

03. The Audit

- A.C.E.R.O framework (Horizontal)
- End-to-End Business Mapping (Vertical)
- Maturity Hierarchy

04. Demos

Central Ideas

Crux of the workshop are these two central ideas

1. People and Processes > AI & Automation
2. Identification of the right problem & processes is expensive; Tech & Building is cheap

**People and Processes (are expensive) >
AI & Automation (is cheap)**

Universal Business Activities

Universal Business Activities

AI is a 10x multiplier—but multiplying a broken process just gives you 10x the chaos

Tracking ROAS and CPC
Local SEO & Google Business Profile
Responding to reviews, comments, DMs etc
Paid ad campaigns
Designing marketing/ad creatives
Outbound prospecting
Scraping lead lists and sending cold emails.
Creating lead magnets
Speed-to-lead
Qualifying leads
Doing data-entry to CRM
Creating & managing quotes/proposals.
Managing the sales calendar and booking consultations.
Nurturing "not ready yet"
Sales team training
Data tracking close rates, pipeline velocity, and sales metrics.

Client onboarding
Managing ongoing projects
Procuring materials & tools
Scheduling service calls, dispatching trucks, or booking deliveries.
Actually performing the core service or delivering the product.
QA and Inspections
3rd Party Vendor Management
Customer support tickets & complaints
SOPs
Final project handover
Collecting Google reviews.
Video testimonials
Running NPS or satisfaction surveys
Win-back campaigns
Upsells or cross-sells strategy
Sending holiday, anniversary, or birthday gifts/emails.

Customer newsletter.
Events or webinars.
Customer loyalty point programs.
Bookkeeping
AR & AP
Paying bills, rent, software, and vendors
Running payroll & taxes
Recruiting
Employee onboarding
Managing IT
Data entry & tracking
Generating financial reports, P&L statements, and tracking KPIs.
Renewing business licenses, permits, and insurance policies
Billing disputes & refund requests.
Designing marketing creatives, flyers, and videos.

The Audit

How to understand your business & industry inside out

What is Audit?

A X-ray of how your business actually runs, where time is wasted, and where money is leaking

Why we need this Audit?

Because you cannot AI the chaos. Diagnose the process before automating the tech

How to do it?

3-Step roadmap

- **A.C.E.R.O framework**
Organize the chaos into 5 universal pillars
- **End-to-End Business mapping**
Follow the dollar end-to-end to see exactly where it leaks
- **Maturity Hierarchy**
Scale each workflow to next step in hierarchy to apply automations & AI

Quick Recap

So far..

- Plug the Revenue Leaks
- Universal Business Activities
- The Audit

A. C. E. R. O. Framework

5 foundational pillars to organize business chaos

A.

 **Attract**

Getting the
market's attention

C.



Convert
Turning attention
into money

E.



Execute
Delivering the
service or product

R.



Retain
Multiplying the
dollar

O.



Operate
Running the
foundation

A. C. E. R. O. Framework

5 foundational pillars to organize business chaos

Attract

- Tracking ROAS and CPC
- Local SEO & Google Business Profile
- Responding to reviews, comments, DMs etc
- Paid ad campaigns
- Designing marketing/ad creatives
- Outbound prospecting
- Scraping lead lists and sending cold emails.
- Creating lead magnets

Convert

- Speed-to-lead
- Qualifying leads
- Doing data-entry to CRM
- Creating & managing quotes/proposals
- Managing the sales calendar and booking consultations
- Nurturing "not ready yet"
- Sales team training
- Data tracking close rates, pipeline velocity, and sales metrics

Execute

- Client onboarding
- Managing ongoing projects
- Procuring materials & tools
- Scheduling service calls, dispatching trucks, or booking deliveries.
- Actually performing the core service or delivering the product.
- QA and Inspections
- 3rd Party Vendor Management
- Customer support tickets & complaints SOPs
- Final project handover

Retain

- Collecting Google reviews
- Video testimonials
- Running NPS or satisfaction surveys
- Win-back campaigns
- Upsells or cross-sells strategy
- Sending holiday, anniversary, or birthday gifts/emails
- Billing disputes & refund requests
- Customer newsletter
- Events or webinars
- Customer loyalty point programs

Operate

- Bookkeeping
- AR & AP
- Paying bills, rent, software, and vendors
- Running payroll & taxes
- Recruiting
- Employee onboarding
- Managing IT
- Data entry, tracking & analysis
- Generating financial reports, P&L statements, and tracking KPIs
- Renewing business licenses, permits, and insurance policies

A. C. E. R. O. Framework — Examples

5 foundational pillars to organize business chaos

- Marketing Agency
- Realtor
- Home Services (HVAC, Plumbing, Roofing, Electrical etc)
- Let's do it for me (I apply what I preach, haha)

A. C. E. R. O. Framework — DIY

5 foundational pillars to organize business chaos

AI Prompt

You are an expert Operations Architect and Management Consultant specializing in business process mapping and revenue architecture.

Your objective is to map out every single universal business activity for a specific business, end-to-end, and organize them into the ACERO Framework.

Business Profile to Analyze:

- Industry / Niche: [INSERT INDUSTRY, e.g., Boutique Marketing Agency, Residential Realtor, Plumbing & HVAC, Strategy Consultant]
- Target Customer (ICP): [INSERT TARGET AUDIENCE, e.g., Mid-market B2B SaaS founders, Homeowners selling \$700k+ properties, Commercial property managers]
- Primary Offer / Deliverable: [INSERT CORE OFFER, e.g., Paid Social Retainer, Full-Service Home Listing, Emergency Drain Clearing & Repiping, 6-Month Operations Transformation]
- Average Ticket Size / Model: [INSERT PRICING MODEL, e.g., \$5,000/mo retainer, 3% commission, \$350 service call / \$12k system replace, \$50,000 fixed milestone project]
- Business Size / Operating Scale: [INSERT SCALE, e.g., Solo operator, Small team of 5–10, Multi-crew enterprise with dispatch]
- My Business Specific Activities: [INSERT YOUR BUSINESS SPECIFIC ACTIVITIES HERE, e.g., Publish at least 2-3 reel on instagram for promotion, Collect Facebook leads and book calls with them, Send Quotations to prospective clients]

The ACERO Framework Definitions:

1. Attract: Getting the market's attention (Positioning, outbound, inbound, brand, partnerships).
2. Convert: Turning attention into money (Discovery, qualification, audits, proposal design, negotiation, closing, payment collection).
3. Execute: Delivering the service or product (Client onboarding, production, staging, fulfillment, quality control, handover).
4. Retain: Multiplying the dollar (Upsells, cross-sells, recurring agreements, client health, referrals, review collection).
5. Operate: Running the foundation & back office (Financials, talent/capacity, legal/compliance, tech stack, SOPs, metrics).

Execution Instructions & Output Requirements:

1. End-to-End Chronological Flow: For each pillar (A, C, E, R, O), think chronologically about what the business must do first, next, and last.
2. Granular & Tactical: Avoid generic statements like "do marketing" or "send invoices." Specify exact deliverables, workflows, industry-standard software tools, metrics, documents, and real-world artifacts (e.g., SOWs, CMAs, permits, Good/Better/Best proposals, QBRs, truck inventory).
3. Sub-Phase Grouping: Under each ACERO pillar, organize the activities into 3–4 logical sub-stages with 3–5 bullet points per sub-stage.
4. Completeness: Do not abbreviate or summarize. Include every essential activity required to run this business without leaving operational gaps.

Required Output Format:

1. A visual ASCII or Mermaid workflow diagram showing the end-to-end flow across ACERO.
2. The Granular Activity Map: Deep dive into all 5 categories (Attract, Convert, Execute, Retain, Operate) structured with bold sub-phases and specific bullet points.
3. Summary Scorecard / Quick-Reference Table: A summary table outlining the Core Goal, Primary Tools/Artifacts, and Key Metric for each of the 5 pillars.

End-to-End Business Mapping

Follow the dollar end-to-end to see exactly where it leaks.

Take the every activity inside each ACERO pillar and map them end-to-end with as much detail as possible by using the VOTE Framework

V.O.T.E Frameworks

- **V — Verb:** What needs to be done?
- **O — Owner:** Who does it?
- **T — Tool:** Using what tool?
- **E — Event:** When? The trigger

A bad mapping example: The contract goes out.

Any guesses why this is a bad example?

A good mapping example using VOTE: When a prospect verbally agrees on a Zoom call (**Event**), Sarah (**Owner**) uses DocuSign (**Tool**) to send (**Verb**) the contract.

Maturity Hierarchy

Scale each workflow to next step in hierarchy

For every activity we mapped, we gauge where that activity stands on Maturity Hierarchy. And what realistically can be done?

01

Business Processes

Manual processes, SOPs,
Checklists

02

Storage

Digital Memory & Storage
(CRMs, ERPs Excel Sheets)

03

Automation

Rules & Logic
(Zap/Make/n8n)

04

AI

Cognitive & Decisions
(AI Agents, Skills, Co-Work)

**We cannot skip a step.
Each step is the foundation for the next.**

End-to-End Business Mapping — Examples

Follow the dollar end-to-end to see exactly where it leaks.

A bad mapping examples: The contract goes out.

Any guesses why this is a bad example?

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A good mapping example using VOTE: When a prospect verbally agrees on a Zoom call (**Event**), Sarah (**Owner**) uses DocuSign (**Tool**) to send (**Verb**) the contract.

Event = When a prospect verbally agrees on the Zoom call

Owner = Sarah

Tool = Uses DocuSign

Verb = To sends the contract to prospect

Let's take it a step further..

End-to-End Business Mapping — Examples

Follow the dollar end-to-end to see exactly where it leaks.

A bad mapping examples: The contract goes out.

A good mapping example using VOTE: When a prospect verbally agrees on a Zoom call (**Event**), Sarah (**Owner**) uses DocuSign (**Tool**) to send (**Verb**) the contract.

The Audit (Potential Revenue Leak)

- If Sarah waits 4 hours to send the contract because she's on another call, the prospect's emotional commitment drops by 50%. Deals that sit overnight invite competitor shopping and cold feet.

The Growth Upside

- Deals sent while the prospect is still on the call have an 80% same-day signing rate. Every hour of delay cuts closing velocity by ~24% (DocuSign State of Agreements data)
- The Goal: Don't just send it faster; Close it live on the call thus increasing revenue without any extra effort.

Maturity Hierarchy Fix

- The Fix: Automation + AI
- The Workflow: Sarah (**owner**) toggles a single checkbox (**verb**) in the CRM (**tool**) during the call (**event**) the system auto-generates the pre-filled DocuSign contract Sarah drops the live signing link into the Zoom chat thus closing the deal fully before hanging up (**verb**)

End-to-End Business Mapping — Examples

Follow the dollar end-to-end to see exactly where it leaks.

- Bad Mapping: We vet prospective clients.
- V.O.T.E. Mapping: When a prospect submits a project description in our Form (**Event**), Alex [Founder] (**Owner**) reads the submission in Google Forms (**Tool**) to evaluate (**Verb**) if their budget and scope match our agency's criteria. (details..)
- Bad Mapping: We follow up with new leads.
- V.O.T.E. Mapping: When a lead submits an inquiry from Facebook Lead Ad asking a question (**Event**), Sam [Sales Rep] (**Owner**) opens his smartphone text app (**Tool**) to compose and send (**Verb**) a tailored answer to their question within 30 minutes.
- Bad Mapping: We log our expense receipts.
- V.O.T.E. Mapping: When a vendor emails a PDF invoice or receipt (**Event**), Lisa [Office Admin] (**Owner**) opens the PDF in Adobe (**Tool**) to re-type (**Verb**) line items, tax numbers, and totals into an Excel tracking sheet.

End to End Business Mapping & Maturity Hierarchy— DIY

5 foundational pillars to organize business chaos

AI Prompt

You are an elite Operations Architect, Fractional COO, and Business Systems Engineer.

Your objective is to conduct a forensic operational audit on my business across the 5 pillars of the ACERO Framework (Attract, Convert, Execute, Retain, Operate).

For each pillar, identify the single most critical, high-friction, time-consuming, or revenue-leaking activity, map its failure mode using the V.O.T.E. Framework, calculate the revenue leak, and design a high-leverage operational fix strictly governed by the Maturity Hierarchy.

BUSINESS CONTEXT & PROFILE

- **Industry / Niche**: [INSERT INDUSTRY / NICHE, e.g., Residential Real Estate, B2B SaaS, Dental Practice]
- **Target Customer / ICP**: [INSERT TARGET CUSTOMER, e.g., Homeowners selling \$400k-\$700k homes / Series A founders]
- **Core Offer & Pricing**: [INSERT OFFER & TICKET SIZE, e.g., Full-service home listing at 3% commission / \$5,000/mo retainer]
- **Team Size & Core Roles**: [INSERT TEAM SIZE & ROLES, e.g., 3 people: Lead Rainmaker, Ops Manager/TC, Junior Agent/ISA]
- **Current Primary Tech Stack**: [INSERT TOOLS IN USE, e.g., Follow Up Boss, Meta Ads, DocuSign, SkySlope, QuickBooks]
- **Known Bottlenecks / Pain Points**: [INSERT CURRENT BOTTLENECK, e.g., Slow lead follow-up, spending 3 hours on proposals, manual paperwork, past clients forgotten]

FRAMEWORKS TO APPLY

- ##### 1. The V.O.T.E. Framework (Granular Process Mapping)
- **V — Verb**: What action must physically be taken? (Specific operational task)
 - **O — Owner**: Who is directly responsible? (Specific human role or automated agent)
 - **T — Tool**: What exact software, platform, or artifact executes or records the action?
 - **E — Event**: What exact trigger starts the workflow? (When does it happen?)

- ##### 2. The Maturity Hierarchy (The Rule of Sequence)
- Fixes MUST be sequential. You cannot skip steps:
1. **Business Processes (SOPs / Checklists)**: Manual clarity, rules, scripts, and human accountability.
 2. **Storage (Digital Memory)**: Systems of record (CRMs, databases, cloud vaults, structured fields).
 3. **Automation (Rules & Logic)**: Deterministic triggers (Zapier, Make, native CRM webhooks).
 4. **AI (Cognitive & Decisions)**: LLMs, AI agents, document parsers, automated summarizers.

Strict Guideline: Be realistic. Do not prescribe AI where a simple CRM field (Storage) or a deterministic webhook (Automation) solves the problem. Prescribe AI ONLY when cognitive judgment, parsing, or content generation is required.

OUTPUT INSTRUCTIONS & REQUIRED STRUCTURE

- Deliver a deep dive across all 5 ACERO Pillars:
- **Pillar 1: ATTRACT** (Lead Generation, Inbound Speed, Outbound)
 - **Pillar 2: CONVERT** (Discovery, Proposals/Audits, Sales Presentation, Closing)
 - **Pillar 3: EXECUTE** (Fulfillment, Client Delivery, Quality Control, Roadblocks)
 - **Pillar 4: RETAIN** (Review Harvesting, Sphere Nurture, Referrals, Lifetime Value)
 - **Pillar 5: OPERATE** (Back-Office, Compliance, Invoicing/Payouts, Financial Controls)

For each pillar, structure the response into the following 4 sections:

- ##### Section 1: The Critical Leaking Activity & Current V.O.T.E. Mapping
- Identify the single highest-risk activity in this pillar.
 - Provide the **Current (Broken/Baseline) V.O.T.E.** breakdown:
 - **Event**: The trigger.
 - **Owner**: The current person doing it.
 - **Tool**: The current tool used.
 - **Verb**: The current manual action taken.

- ##### Section 2: The Audit (The Revenue Leak & Friction Cost)
- **The Operational Friction**: What breaks, stalls, or slows down?
 - **The Financial & Conversion Leak**: Quantify the revenue lost using realistic benchmarks (e.g., drop in conversion rate, lost deals, wasted ad spend, or lost billable hours).

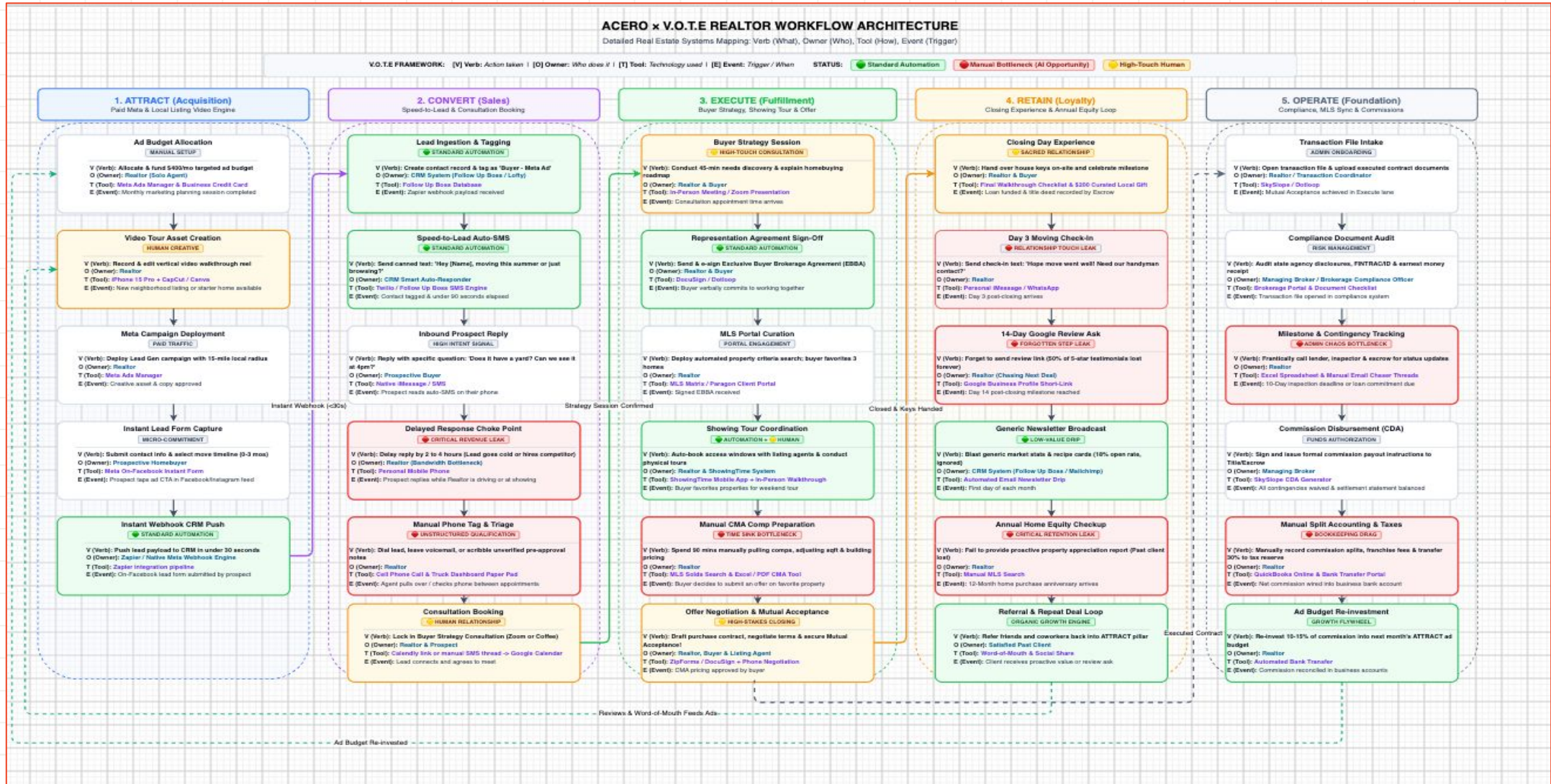
- ##### Section 3: The Growth Upside
- What is the tangible upside of solving this?
 - Define the clear operational North Star / benchmark target (e.g., cut turnaround time from 48 hours to 20 minutes; 80% same-day signing rate).

- ##### Section 4: The Maturity Hierarchy Diagnostic & Upgraded V.O.T.E. Workflow
- **Maturity Audit**: Break down exactly what is needed at each level:
 - *Process / SOP*: What checklist, script, or rule is required?
 - *Storage*: What database, custom fields, or cloud folders are needed?
 - *Automation*: What conditional logic, webhook, or trigger executes?
 - *AI*: What cognitive task or LLM/AI model is deployed (or state "None needed" if pure automation suffices)?
 - **The Upgraded V.O.T.E. Workflow**: Walk through the new end-to-end flow step-by-step using clear V.O.T.E. milestones showing how the human, tools, automation, and AI interact.

- ### FINAL SUMMARY DELIVERABLE
- Conclude with a clean **Maturity Architecture & Resource Allocation Table**:
- Columns: `ACERO Pillar` | `Critical Leaking Activity` | `Maturity Stage Applied` | `Primary Fix Mechanism` | `Human Attention Shift (Stop Doing X → Start Doing Y)`

End-to-End Business Mapping — Advance Examples

Follow the dollar end-to-end to see exactly where it leaks.



Demo

Some real life examples

The Zero-Cost Quick Wins

- Follow-up with Cold Leads (Convert)
- Client Referral Harvester (Retain) — Easiest to miss, biggest opportunity
- Process new invoice (Operate) — Save Admin 7-10 hours each week

“

Thank You

Plug the Revenue **Leaks**
The Small Business AI Playbook to Automate **Growth & Drive Revenue**