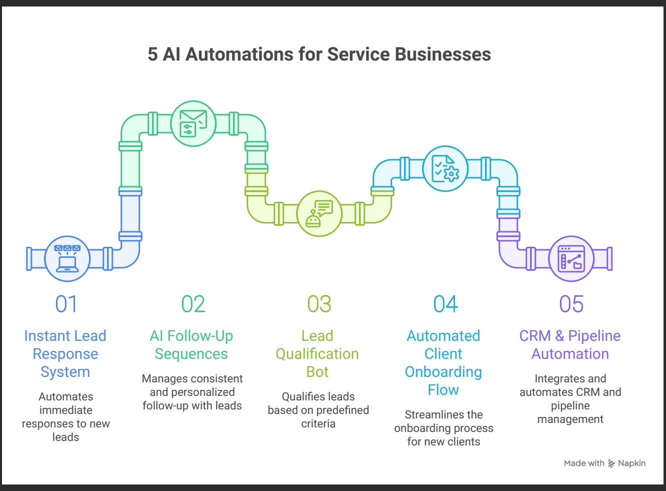
FREE GUIDE

The 5 AI Automations Every Service Business Needs

The precise systems we implement for each client during the first 30 days — and the concrete results each one produces for real estate teams, agencies, coaches, and service businesses.


5 AI Automations for Service Businesses
01
Instant Lead Response System
Automates immediate responses to new leads
02
AI Follow-Up Sequences
Manages consistent and personalized follow-up with leads
03
Lead Qualification Bot
Qualifies leads based on predefined criteria
04
Automated Client Onboarding Flow
Streamlines the onboarding process for new clients
05
CRM & Pipeline Automation
Integrates and automates CRM and pipeline management
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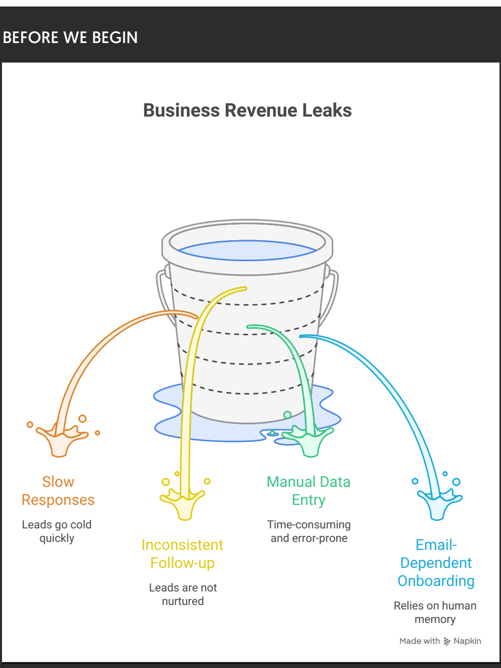
BEFORE WE BEGIN


Business Revenue Leaks
Slow Responses
Leads go cold quickly
Inconsistent Follow-up
Leads are not nurtured
Manual Data Entry
Time-consuming and error-prone
Email-Dependent Onboarding
Relies on human memory
Made with Napkin

Twenty-four Thousand Dollars. The average annual cost of 2 hours/day in manual admin work at $50/hour — before accounting for the deals you didn't close because you were buried in that work.

The five automations in this guide are the ones we implement first with every client. They address the highest-impact points of failure in the service business revenue cycle. Each one includes what it is, why it matters, what tools we use to build it, and what result you can expect.

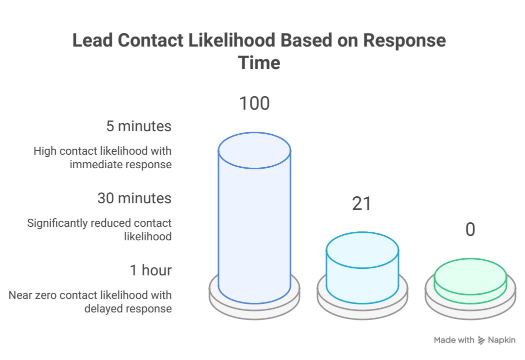
Read it. Save it. And if you want us to build any of it for your business, book a free audit call at the link at the end.

01 **Instant Lead Response System:** The automation that recovers leads you're already losing

THE PROBLEM

Leads go cold in minutes, not hours.
When a lead fills out a form, sends a DM, or clicks an ad, they are in a decision-making window that closes fast. Research from MIT shows that if you follow up with a lead within 5 minutes of their inquiry, you are 100 times more likely to make contact than if you wait 30 minutes. After an hour, the odds drop to near zero.

Most service businesses respond in 4 hours or more. Some don't follow up until the next business day. By then, the lead has already talked to a competitor who moved faster.

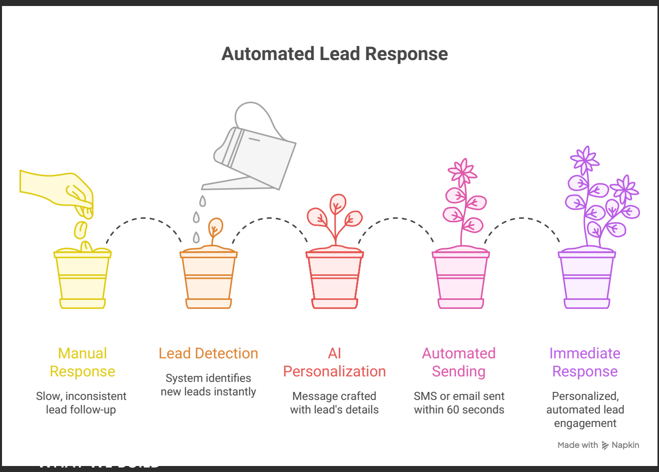


You are 21 times LESS likely to qualify a lead if you respond after 30 minutes. Speed is your competitive advantage — and most businesses are giving it away.

THE SOLUTION

A 60-second automated response — personalized, every time.
We build a system that detects every new lead the moment they come in — from your website form, social DM, ad platform, or CRM — and sends them a personalized SMS or email within 60 seconds. Automatically. Without anyone on your team touching their phone.

The message is AI-written, uses the lead's name, references what they were looking at, and asks one qualifying question to start the conversation. It doesn't feel robotic. It feels like you responded immediately — because the system did.


Automated Lead Response
Manual Response
Slow, inconsistent lead follow-up
Lead Detection
System identifies new leads instantly
AI Personalization
Message crafted with lead's details
Automated Sending
SMS or email sent within 60 seconds
Immediate Response
Personalized, automated lead engagement
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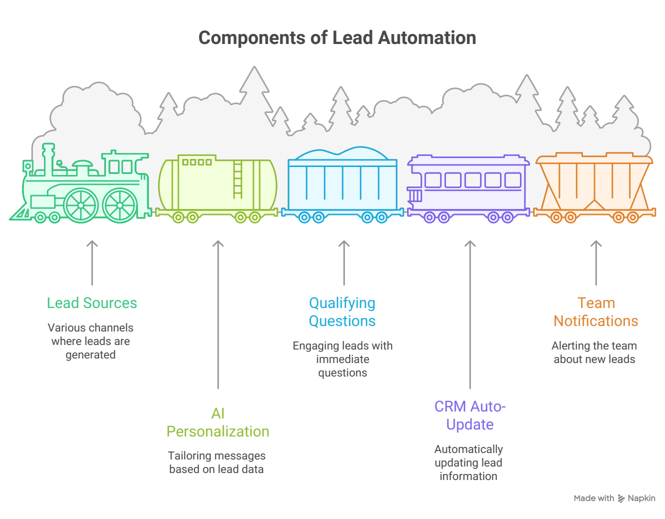
Included in this automation:
→ Trigger connected to all your lead sources (forms, ads, social, CRM)
→ AI-personalized SMS or email sent within 60 seconds of opt-in
→ Qualifying question to immediately start the conversation
→ CRM auto-update when lead receives their first message
→ Notification to your team that a new lead has been contacted


Components of Lead Automation
Lead Sources
Various channels where leads are generated
AI Personalization
Tailoring messages based on lead data
Qualifying Questions
Engaging leads with immediate questions
CRM Auto-Update
Automatically updating lead information
Team Notifications
Alerting the team about new leads
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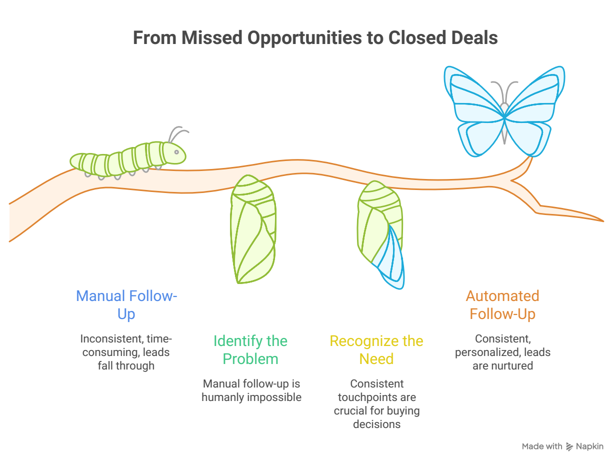
02	**AI Follow-Up Sequences:** The automation that closes deals that would have gone cold

THE PROBLEM

The fortune is in the follow-up. Most businesses don't have a system for it.

Studies consistently show that the average buying decision happens after 7 to 12 touchpoints. Most salespeople give up after 2. Not because they don't want to close the deal — but because manually following up with 50 leads at different stages, with personalized messages, at the right intervals, is humanly impossible to do consistently.

So leads fall through. Not because they weren't interested. Because no one stayed top of mind long enough for them to say yes.


From Missed Opportunities to Closed Deals
Manual Follow-Up
Inconsistent, time-consuming, leads fall through
Identify the Problem
Manual follow-up is humanly impossible
Recognize the Need
Consistent touchpoints are crucial for buying decisions
Automated Follow-Up
Consistent, personalized, leads are nurtured
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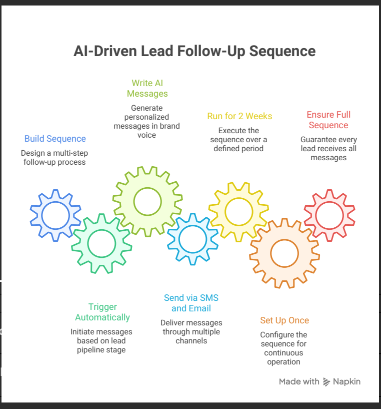
AI-Driven Lead Follow-Up Sequence
Write AI Messages
Generate personalized messages in brand voice
Build Sequence
Design a multi-step follow-up process
Run for 2 Weeks
Execute the sequence over a defined period
Ensure Full Sequence
Guarantee every lead receives all messages
Trigger Automatically
Initiate messages based on lead pipeline stage
Send via SMS and Email
Deliver messages through multiple channels
Set Up Once
Configure the sequence for continuous operation
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WHAT TH

10-Touch F
→ Day 1 —
→ Day 2 — Value: A relevant insight, tip, or resource for their situation
→ Day 4 — Pain: A direct question about the specific problem they're facing

→ Day 10 — Soft offer: An invitation to see how this works for their business

→ Day 7 — Social proof: A result or case study relevant to their business type

→ Day 14 — Urgency: A limited-time or capacity framing
→ Day 21 — Breakup: A final honest message that leaves the door open
→ Day 10 — Soft offer: An invitation to see how this works for their business
→ Days 30, 60, 90 — Long-term nurture: Monthly value touchpoints for leads not yet ready

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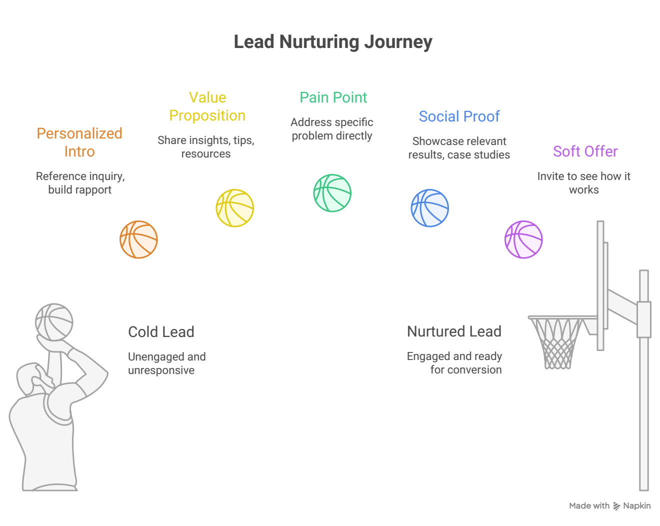
Lead Nurturing Journey
Personalized Intro
Reference inquiry, build rapport
Value Proposition
Share insights, tips, resources
Pain Point
Address specific problem directly
Social Proof
Showcase relevant results, case studies
Soft Offer
Invite to see how it works
Cold Lead
Unengaged and unresponsive
Nurtured Lead
Engaged and ready for conversion
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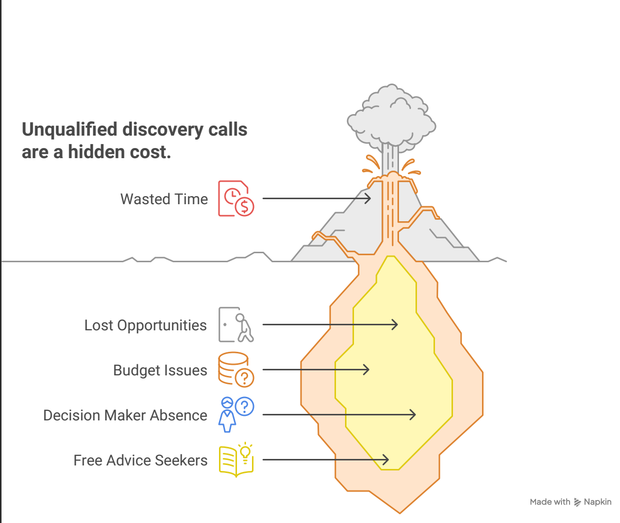
03	time

THE PROBLEM

Every unqualified discovery call costs you 30–60 minutes you can't get back.

If you're doing 10 discovery calls a week and only 2 or 3 of them turn into real opportunities, you are spending 7–8 hours a week on conversations that were never going to close. Over a month, that's 28–32 hours — almost an entire work week — spent on people who didn't have the budget, weren't the decision maker, or just wanted free advice.

That time is not just wasted. It's stolen from the deals you could have been closing.


Unqualified discovery calls are a hidden cost.
Wasted Time
Lost Opportunities
Budget Issues
Decision Maker Absence
Free Advice Seekers
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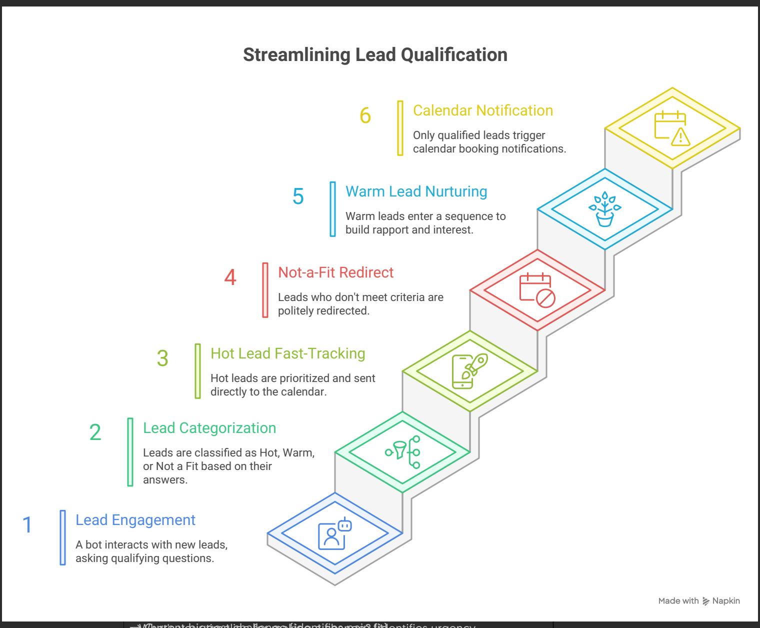
notification for leads who already meet your criteria.


Streamlining Lead Qualification
6
Calendar Notification
Only qualified leads trigger calendar booking notifications.
5
Warm Lead Nurturing
Warm leads enter a sequence to build rapport and interest.
4
Not-a-Fit Redirect
Leads who don't meet criteria are politely redirected.
3
Hot Lead Fast-Tracking
Hot leads are prioritized and sent directly to the calendar.
2
Lead Categorization
Leads are classified as Hot, Warm, or Not a Fit based on their answers.
1
Lead Engagement
A bot interacts with new leads, asking qualifying questions.
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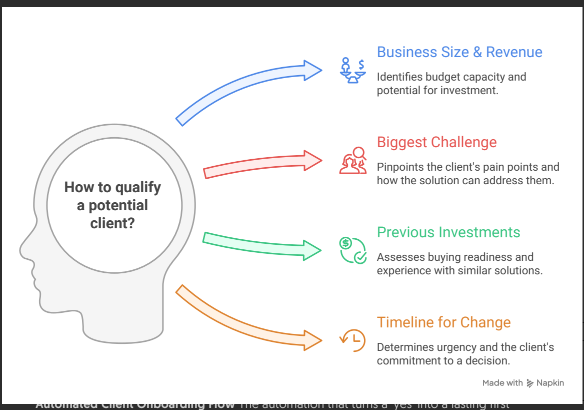
→ What's your timeline for making a change? [identifies urgency
→ Have you invested in similar solutions before? [identifies buying readiness]
→ What's your timeline for making a change? [identifies urgency


How to qualify a potential client?
Business Size & Revenue
Identifies budget capacity and potential for investment.
Biggest Challenge
Pinpoints the client's pain points and how the solution can address them.
Previous Investments
Assesses buying readiness and experience with similar solutions.
Timeline for Change
Determines urgency and the client's commitment to a decision.
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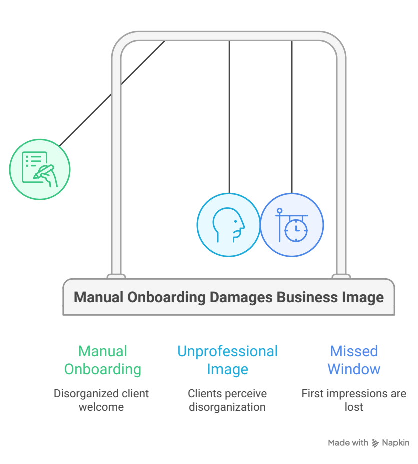
Automated Client Onboarding Flow The automation that turns a "yes" into a lasting first impression

THE PROBLEM

Manual onboarding is where good businesses look unprofessional.

The moment a client says yes is the most important moment in your client relationship. It sets the tone for everything that follows. And yet for most service businesses, what happens immediately after a client signs is: someone remembers to send a welcome email, maybe a day or two later. Then someone else remembers to send the intake form. The kickoff call gets scheduled after two rounds of back-and-forth.

Clients interpret this chaos as disorganization — even if your actual work is excellent. First impressions happen in the first 24 hours. Manual onboarding almost always misses that window.


Manual Onboarding Damages Business Image
Manual Onboarding
Disorganized client welcome
Unprofessional Image
Clients perceive disorganization
Missed Window
First impressions are lost
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is signed.

manual

y. No one on

→ Immediate welcome email with confirmation and what to expect next

→ Intake form sent within 5 minutes of signing to collect all required info

→ Document request triggered once intake form is submitted

→ Calendar invitation automatically sent for the kickoff call

→ Day 2 check-in message confirming everything was received

→ Internal notification to your team with all client info pre-loaded

→ Milestone update messages sent to the client throughout the project

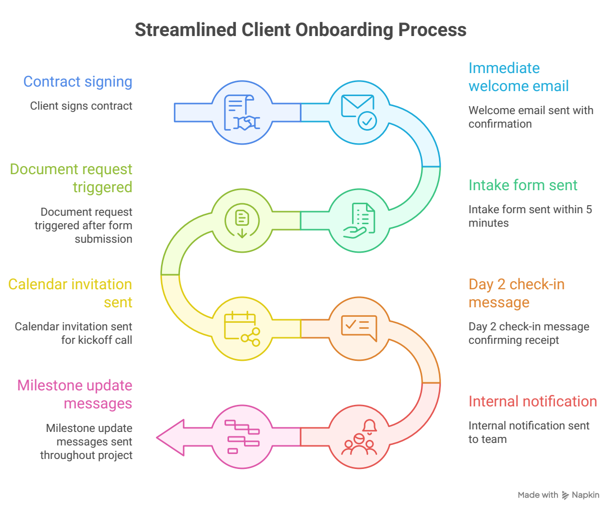
→ Document request triggered once intake form is submitted

→ Calendar invitation automatically sent for the kickoff call

→ Day 2 check-in message confirming everything was received

→ Internal notification to your team with all client info pre-loaded

→ Milestone update messages sent to the client throughout the project


Streamlined Client Onboarding Process
Contract signing
Client signs contract
Immediate welcome email
Welcome email sent with confirmation
Intake form sent
Intake form sent within 5 minutes
Document request triggered
Document request triggered after form submission
Calendar invitation sent
Calendar invitation sent for kickoff call
Day 2 check-in message
Day 2 check-in message confirming receipt
Internal notification
Internal notification sent to team
Milestone update messages
Milestone update messages sent throughout project
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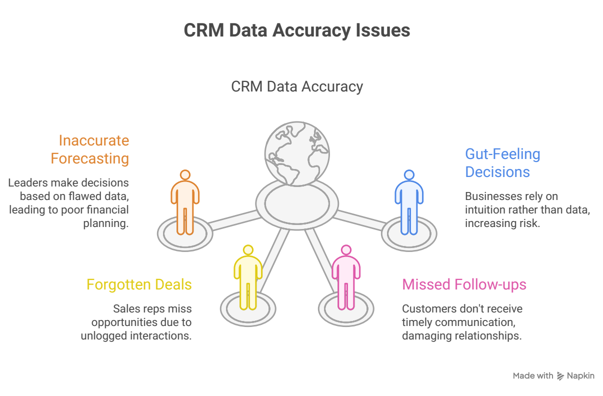
go unlogged because the manual entry is a chore. Over weeks and months, the pipeline becomes a graveyard of stale data — and every decision made from it is made on wrong information.

Leaders can't forecast. Deals get forgotten. Follow-ups fall through. And the business operates on gut feeling instead of data — not because they don't have a CRM, but because the CRM isn't working.


CRM Data Accuracy Issues
CRM Data Accuracy
Inaccurate Forecasting
Leaders make decisions based on flawed data, leading to poor financial planning.
Gut-Feeling Decisions
Businesses rely on intuition rather than data, increasing risk.
Forgotten Deals
Sales reps miss opportunities due to unlogged interactions.
Missed Follow-ups
Customers don't receive timely communication, damaging relationships.
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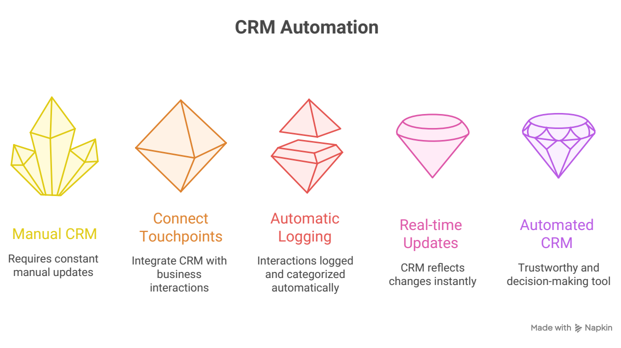
WHAT GETS AUTOMATED


CRM Automation
Manual CRM
Requires constant manual updates
Connect Touchpoints
Integrate CRM with business interactions
Automatic Logging
Interactions logged and categorized automatically
Real-time Updates
CRM reflects changes instantly
Automated CRM
Trustworthy and decision-making tool
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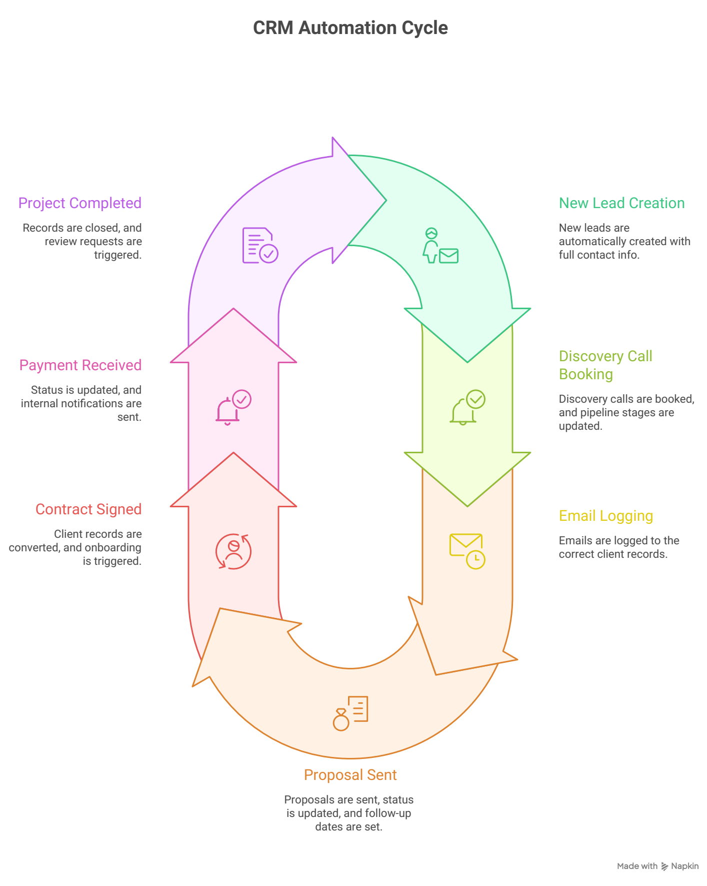
→ Project completed — record closed, review request triggered


CRM Automation Cycle
New Lead Creation
New leads are automatically created with full contact info.
Discovery Call Booking
Discovery calls are booked, and pipeline stages are updated.
Email Logging
Emails are logged to the correct client records.
Proposal Sent
Proposals are sent, status is updated, and follow-up dates are set.
Contract Signed
Client records are converted, and onboarding is triggered.
Payment Received
Status is updated, and internal notifications are sent.
Project Completed
Records are closed, and review requests are triggered.
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The First Step Is Free Book a free AI Business Audit. We'll identify exactly where your business is losing time and money — and show you which of these five automations would have the highest impact for you specifically.

Book your free audit at:

https://www.apexintegrations.com.mx/audit-booking

No commitment. No tech knowledge required. 45 minutes. Free.
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