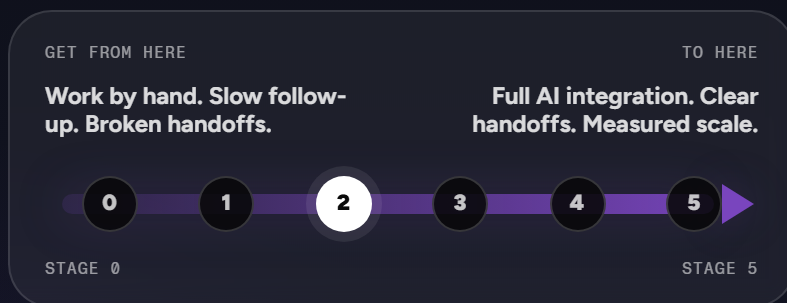


THE WORKFLOW AUTOPILOT ROADMAP

WHAT STAGE IS YOUR BUSINESS IN?

Go from manual work to Workflow AI.

Find it. Fix it. Move up.



THIS IS NOT A TECH SCORE

It is a work score.

Find the stage you are in. Fix that stage first. Then move up with less drag and less guesswork.

0 BY HAND
DOING IT BY HAND

1 TOO SLOW
WORK IS TOO SLOW

2 LEADS
LEADS GO COLD

3 TOOLS
TOOLS DON'T TALK

4 TEAM
TEAM CAN'T KEEP UP

5 SCALE
READY TO SCALE

Find your stage. Fix it first. Move up with less drag.

FIND YOUR STAGE

Start at 0. Read down.

Stop at the first one that feels true.

0

DOING IT BY HAND

Too much work by hand



1

WORK IS TOO SLOW

The work gets done, but too late



2

LEADS GO COLD

Interest comes in, but follow-up is slow



3

TOOLS DON'T TALK

Data lives everywhere



4

TEAM CAN'T KEEP UP

Good people are buried in cleanup



5

READY TO SCALE

The basics work. Now measure and expand





THE FAST VERSION

The whole roadmap on one page.

See all 6 stages fast. Then go to your page.

STAGE	WHAT IT FEELS LIKE	MAIN PROBLEM	GRADUATE BY
<p>STAGE 0</p> <p>DOING IT BY HAND</p>	Too much work by hand	You are the system	Make one daily task start on its own
<p>STAGE 1</p> <p>WORK IS TOO SLOW</p>	The work gets done, but too late	Work sits between steps	Cut the waits that slow the work
<p>STAGE 2</p> <p>LEADS GO COLD</p>	Interest comes in, but follow-up is slow	Slow first touch	Reply and route every lead fast
<p>STAGE 3</p> <p>TOOLS DON'T TALK</p>	Data lives everywhere	Double entry and broken handoffs	Build one clean flow between core tools
<p>STAGE 4</p> <p>TEAM CAN'T KEEP UP</p>	Good people are buried in cleanup	Low-value work eats up the team	Free the team from repeat work
<p>STAGE 5</p> <p>READY TO SCALE</p>	The basics work. Now measure and expand	Growth breaks systems no one measures	Monitor what works and scale it



HOW TO USE THIS GUIDE

Find it. Fix it. Move up.

This guide is here to show the next fix.

1 STEP 1

Find your stage.

Pick the first one that feels true.

2 STEP 2

Fix that stage.

Do not skip ahead.

3 STEP 3

Then move up.

Make the next fix only after this one works.

START HERE, NOT HERE

DO NOT DO THIS	→	DO THIS
Buy more tools first.		Fix the stuck step first.

DO NOT DO THIS	→	DO THIS
Map every edge case.		Fix the thing that repeats most.

DO NOT DO THIS	→	DO THIS
Try to fix all 6 stages.		Fix one stage at a time.

LOOK FOR THIS FIRST

- Slow reply
- Manual copy
- Lost handoff
- Status chasing

THE ORDER

Find the stuck step → **Fix the handoff** → **Then add tools**

THE POINT

Start with the bottleneck. Not the tool.

STAGE 0

DOING IT BY HAND

Work moves when you touch it. Nothing starts on its own. Small tasks pile up fast.

ROLE

Owner

TEAM SIZE

1-3 people

MOST WEEKS FEEL LIKE

Too much work by hand

MAIN PROBLEM

You are the system

GRADUATE BY

Make one daily task start on its own

FIX THIS STAGE FIRST

Then move up.



LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Leads sit in your inbox.
- People copy the same info twice.
- Reminders live in your head.

FIX FIRST

- List the 5 tasks you do every day.
- Pick the one that starts the same way each time.
- Make the first handoff happen without you.

GRADUATE WHEN

- The task starts on its own.
- Work gets done even when you are not watching.
- You stop cleaning it up at night.

AI LEVEL 0

No AI yet

Start small. Let AI help with one task. Do not make it the system yet.

STAGE 1

WORK IS TOO SLOW

The work gets done. It just moves too slow. Updates, approvals, and follow-up drag it out.

ROLE

Fixer

TEAM SIZE

1-5 people

MOST WEEKS FEEL LIKE

The work gets done, but too late

MAIN PROBLEM

Work sits between steps

GRADUATE BY

Cut the waits that slow the work

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND **DOING IT BY HAND**
- 1 TOO SLOW **WORK IS TOO SLOW**
- 2 LEADS **LEADS GO COLD**
- 3 TOOLS **TOOLS DON'T TALK**
- 4 TEAM **TEAM CAN'T KEEP UP**
- 5 SCALE **READY TO SCALE**

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- People ask for updates all day.
- Work is ready to move but waits on one click.
- Customers wait because nobody sees the bottleneck.

FIX FIRST

- Time each step.
- Find where work sits.
- Auto-send reminders and status updates.

GRADUATE WHEN

- Work gets faster each week.
- People know where work is without asking.
- Fewer tasks stall halfway through.

AI LEVEL 1

Uses ChatGPT now and then

AI can help write and sum things up here. But the real win is still better handoffs.

STAGE 2

LEADS GO COLD

Leads come in. Follow-up is slow or uneven. Good leads cool off while the team is busy.

ROLE

Responder

TEAM SIZE

1-10 people

MOST WEEKS FEEL LIKE

Interest comes in, but follow-up is slow

MAIN PROBLEM

Slow first touch

GRADUATE BY

Reply and route every lead fast

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND **DOING IT BY HAND**
- 1 TOO SLOW **WORK IS TOO SLOW**
- 2 LEADS **LEADS GO COLD****
- 3 TOOLS **TOOLS DON'T TALK**
- 4 TEAM **TEAM CAN'T KEEP UP**
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LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- New leads sit in forms, inboxes, or DMs.
- Different people follow up in different ways.
- Good prospects go quiet before anyone moves.

FIX FIRST

- Connect every lead source to one place.
- Send a fast first reply.
- Assign a clear owner and next step.

GRADUATE WHEN

- Every lead gets a fast first touch.
- No lead sits with no owner.
- Managers can see response speed.

AI LEVEL 2

AI helps with first replies

This is a good place for AI. Use it to speed first replies and keep the next step clear.

STAGE 3

TOOLS DON'T TALK

You have the apps. The problem is the gaps between them. People type the same info again because the tools do not share it.

ROLE

Coordinator

TEAM SIZE

3-15 people

MOST WEEKS FEEL LIKE

Data lives everywhere

MAIN PROBLEM

Double entry and broken handoffs

GRADUATE BY

Build one clean flow between core tools

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND **DOING IT BY HAND**
- 1 TOO SLOW **WORK IS TOO SLOW**
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- 5 SCALE **READY TO SCALE**

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Different tools show different answers.
- The team makes backup spreadsheets.
- Handoffs break when data misses one field.

FIX FIRST

- Map where data starts, moves, and stops.
- Choose one source of truth.
- Kill double entry first.

GRADUATE WHEN

- Status stays in sync.
- The team trusts what the system says.
- Less work gets lost between apps.

AI LEVEL 3

AI works inside tool handoffs

AI gets stronger here because the tools share the same facts. Now it can sort, route, and update cleanly.

STAGE 4

TEAM CAN'T KEEP UP

The team works hard. But too much time goes to admin. Growth adds more cleanup and more drag.

ROLE

Manager

TEAM SIZE

5-30 people

MOST WEEKS FEEL LIKE

Good people are buried in cleanup

MAIN PROBLEM

Low-value work eats up the team

GRADUATE BY

Free the team from repeat work

FIX THIS STAGE FIRST

Then move up.

- 0 BY HAND **DOING IT BY HAND**
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LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Good people spend hours on copy-and-paste work.
- Customers wait because the team is buried.
- Busy weeks create even more cleanup.

FIX FIRST

- Pull repeat work off high-value roles.
- Standardize intake, onboarding, and updates.
- Make a simple path for edge cases.

GRADUATE WHEN

- The team spends less time chasing details.
- Work keeps moving during busy weeks.
- Customers stop feeling the chaos.

AI LEVEL 4

AI takes repeat work off the team

Use AI to take repeat work off the team. Do not use it to replace judgment.

STAGE 5

READY TO SCALE

The basics work. Now you need clear visibility and room to grow. This is where you stop patching and start measuring.

ROLE

Operator

TEAM SIZE

10-50+ people

MOST WEEKS FEEL LIKE

The basics work. Now measure and expand

MAIN PROBLEM

Growth breaks systems no one measures

GRADUATE BY

Monitor what works and scale it

FIX THIS STAGE FIRST

Then move up.

0

BY HAND

DOING IT BY HAND

1

TOO SLOW

WORK IS TOO SLOW

2

LEADS

LEADS GO COLD

3

TOOLS

TOOLS DON'T TALK

4

TEAM

TEAM CAN'T KEEP UP

5

SCALE

READY TO SCALE

LESS DRAG BEATS MORE TOOLS

WHAT THIS LOOKS LIKE

- Automations run but nobody owns them.
- Errors hide until a customer feels them.
- Growth outpaces the way work is documented.

FIX FIRST

- Add alerts when key flows break.
- Track time saved, speed, and conversion.
- Expand from proven wins, not random ideas.

GRADUATE WHEN

- The system is measured.
- New workflows roll out from a plan.
- You can grow without guessing.

AT LEVEL 5

AI helps watch and scale the system

Now AI should help watch the system and flag risk. Do not skip here before the basics are real.

WHAT GOOD LOOKS LIKE

This is what fixed looks like.

Work starts. It moves. The team trusts it.

1

Work starts on time.

People do not have to kick it off by hand.

2

The handoff is clear.

The next step is easy to see.

3

The team trusts it.

People stop checking and chasing all day.

WORK SHOULD MOVE LIKE THIS

1

Lead comes in

2

Fast first reply

3

Right owner gets it

4

Next step is clear

IF YOU STILL SEE THIS, IT IS NOT FIXED

Inbox work

Different answers

Slow reply

Friday cleanup

Dropped work

WHERE AI FITS

AI comes after the workflow.

First make the work clear. Then let AI help.

1

CLEAN THIS FIRST

AI works when these are clear.

Clear trigger

Clear owner

Clear next step

2. USE AI FOR THIS

Good AI jobs

- Draft replies
- Sum up calls
- Tag and route work
- Flag missing info

NOT THIS

Do not use AI for this

- Guess what to do
- Fix a broken process
- Replace the owner
- Hide mistakes

3

ADD AI HERE

Use it at the stage you are in.

STAGE 0-1

Not yet.

If work is still by hand or still slow, fix that first.

STAGE 2-3

Now it helps.

This is where it can speed replies and move work.

STAGE 4-5

Now it can scale.

Now it can take repeat work off the team and flag problems.

THE RULE

Fix the workflow first. Then add AI.

FREE WORKFLOW AI AUDIT

Want help fixing this?

Short call. Clear plan.



BOOK HERE

workflowautopilot.com/contact

info@workflowautopilot.com

WHO IT IS FOR

For teams past \$500k with work that feels slow, stuck, or broken.

WHAT YOU GET

A free Workflow AI audit. We show you what to fix first.

NOT THERE YET?

Not there yet? Start with the free content at workflowautopilot.com/learn.

NEXT STEPS

1. Go to workflowautopilot.com/contact.
2. Pick a time on the calendar.
3. We talk through what feels slow, stuck, or broken.
4. We show you what to fix first.
5. You leave with a clear first move, even if we are not the right fit.

If this feels like you, I look forward to talking to you.

Tyler

This guide is for education. Results depend on your business, effort, skill, team, and execution.