

Boosting Business Efficiency with AI: A Practical Guide to Process Automation

Heidi Araya, BrightLogic (January 2025)

In today's fast-paced business world, staying competitive means finding ways to work smarter, not just harder. But with all the buzz around artificial intelligence and automation, how do you actually put these tools to work in your business? Let's explore a real-world example that shows exactly how one business owner transformed their operations using AI and automation.

Note: this white paper has a [YouTube guide](#) if you prefer to listen to that instead.



The Story: From Overwhelmed to Optimized

Picture this: A successful handyman business owner is swamped with leads coming in from everywhere - phone calls, texts, emails, website forms, and social media messages. He's missing potential customers because he simply can't keep up with all the communications. Sound familiar? This is a common challenge for growing businesses, regardless of industry.

The owner's biggest frustration? Phone calls. He was constantly letting calls go to voicemail, then playing phone tag trying to get basic information about jobs. When he finally connected with potential customers, he'd have to ask them to send photos of the work needed - adding another step to an already lengthy process.

The Solution: A Step-by-Step Approach

Step 1: Understanding the Current Process

Before jumping into automation, the first crucial step was mapping out exactly how things were working (or not working). This revealed:

- A complex web of 15-25 different steps for handling each new lead
- Multiple decision points (What if the customer doesn't respond? What if the price isn't right?)
- Various communication channels to manage
- Coordination needed between customers and subcontractors
- Follow-up tasks like scheduling, payment collection, and review requests

Key Insight: Most businesses have more complex processes than they realize. Writing everything down helps identify opportunities for improvement.

Step 2: Finding Automation Opportunities

After mapping out the process, it became clear that while many tasks could be automated, some needed to stay personal. Here's what they discovered:

Could Be Automated:

- Initial lead capture and information gathering
- Basic customer communications
- Reminder messages
- Follow-up scheduling

- Status update requests

Should Stay Personal:

- Final price negotiations
- Personal feedback responses
- Complex problem-solving
- Relationship building moments

Key Insight: Just because something can be automated doesn't mean it should be. The goal is to automate routine tasks while preserving the human touch that makes your business special.

Step 3: Starting Small but Smart

Instead of trying to automate everything at once, they focused on the biggest pain point: phone calls. The solution? An AI-powered virtual receptionist that could:

- Answer calls 24/7
- Have natural conversations with potential customers
- Collect essential information (location, job details)
- Request photos
- Send structured summaries to the business owner

The Technology Behind It (In Plain English)

The solution combines three main pieces:

1. An AI voice agent that sounds natural and can have real conversations
2. A system to process and organize the information from calls
3. Automated workflows to get that information to the right place

The Results: Real Business Impact

The new system delivered several key benefits:

- No more missed leads from phone calls
- Complete information gathered the first time
- Photos received before the first callback
- More time for actual work instead of phone tag
- Better organized customer information
- Happier customers who could reach the business anytime

Lessons for Your Business

1. **Start with Understanding** Don't jump straight into automation. Take time to understand your current processes first.
2. **Think Big, Start Small** Pick one important problem to solve first. Success there will build confidence for bigger changes.
3. **Keep the Human Touch** Use automation to enhance, not replace, the personal aspects of your business.
4. **Focus on Outcomes** Sometimes AI can help you skip steps entirely rather than just making them faster.
5. **Look for Patterns** Use AI to analyze customer interactions and identify improvement opportunities.

Getting Started in Your Business

1. **Map Your Processes**
 - Write down every step in your key business processes
 - Note pain points and bottlenecks
 - Identify what takes the most time
2. **Choose Your First Project**
 - Look for repetitive tasks
 - Focus on areas where you're losing business
 - Start with something manageable
3. **Consider the Human Factor**
 - Identify where personal touch matters most
 - Plan how automation can support, not replace, these moments
 - Think about both customer and employee experience

Looking Ahead

The beauty of starting with automation is that you can build on your success. Once you've automated one process successfully, you'll start seeing opportunities everywhere. The key is to stay focused on solving real problems and maintaining the quality that makes your business special.

Ready to Learn More?

This case study shows just one way to use AI and automation in business. Every business is different, but the principles remain the same: understand your processes, start with important problems, and keep the human touch where it matters.

For more information about implementing similar solutions in your business, you can connect with [Heidi Araya on LinkedIn](#) or visit brightlogicgroup.com.

If you're ready to book an appointment, schedule time here. <https://cal.com/heidiaraya/discovery>

