



AUTOMATIZAIA FRAMEWORK™

How to get into AI without throwing your money out **the window**

The honest guide to where to start, what to fix first, and how a business gets ordered so that artificial intelligence is actually good for something.

Wanting to get into AI and not knowing where to start is not ignorance.

It is normal. A new tool comes out every day, everyone posts that they already automated something, and you are left with the uncomfortable feeling that the train is leaving and you are watching it from the platform.

That feeling does not mean you are behind: it means **nobody has explained the order to you.**

Because the real problem is not the technology. It is that your business does things every single day in a way nobody ever wrote down, and you cannot build anything on top of that. Artificial intelligence does not tidy up a messy business: **it makes the mess faster.**

This manual is not going to sell you urgency. It is going to show you the order we work in every day — the same one, with no ornament — so that you know **exactly what your next step is.** If by the end you decide to do it yourself, that is perfect: that is what we wrote it for.

**What is being lost meanwhile is not "modernity".
It is sales somebody else answered, and hours of your
team's time that do not come back.**

None of this feels like a technology problem.

It feels like a bad day. But every line below has a cost you can count:

- The **WhatsApp** message that came in at 9 at night and got answered at 10 the next morning.
- The one who **filled in the form** on your site and never heard back from you.
- The **appointment nobody showed up to** because nobody confirmed it the day before.
- The same piece of data **typed three times**: the chat, the spreadsheet, the system.
- The thing **only one person knows how to do** — and this week they are on holiday.
- The **quote** that took two days because someone had to go and look up prices.
- The customer who **asked on Instagram** and got tired of waiting.
- The **unpaid invoice** from 45 days ago that nobody chased.
- The **Monday report** that takes you half a morning to put together.
- The **follow-up** that depended on somebody remembering. Nobody did.

If you recognised three or more, you do not have a tools problem.

You have processes with no owner — and that can be fixed.

It is not AI. It is not the tools.

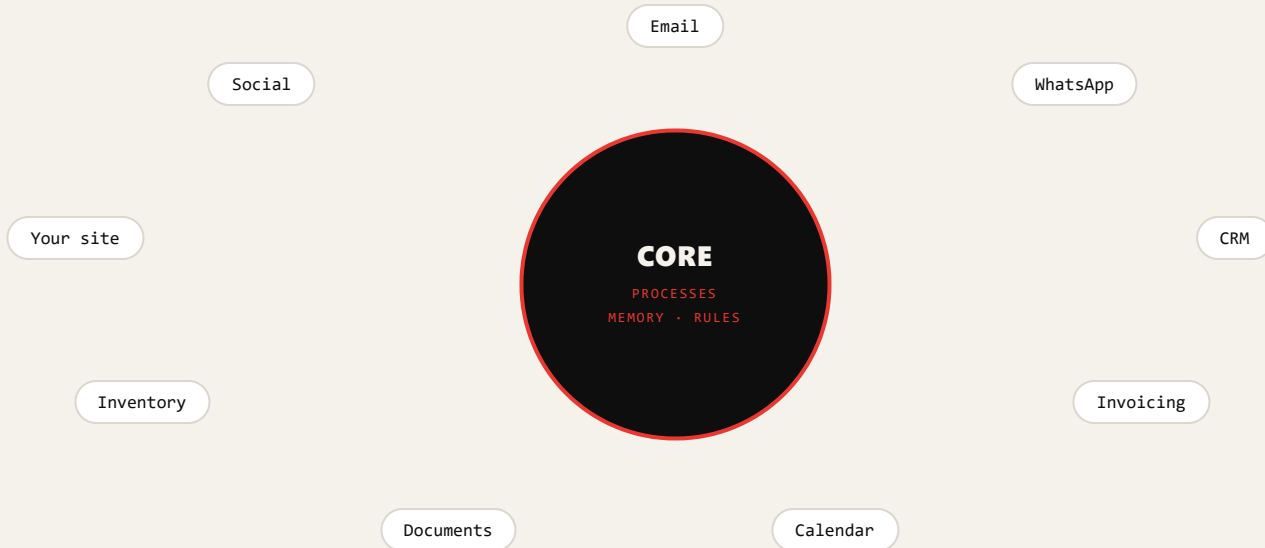
Almost everyone starts the same way — and it ends like this:

```
a general AI assistant →  
  a different assistant →  
    an automation platform →  
      another automation platform →  
        one more chatbot →  
          another CRM →  
            the result.
```

An awful lot of tools.
Very few processes **actually resolved.**

Each one keeps its own information, none of them knows what the other did, and the job of joining them up ends up being human again. Six subscriptions paid for, to carry on copying and pasting.

We do not install tools. We design a **Core**.



A single architecture where your **processes, your memory, your business rules and your agents** — all live, and from which everything else connects. It is not one more tool: it is the point where the others stop working in isolation.

The practical difference: when the assistant answers a WhatsApp message, **it knows what that customer bought last year**, at what price and who served them. Not because it is cleverer, but because there is one place where that is written down.

IT CONNECTS TO WHAT YOU ALREADY USE — NOTHING GETS THROWN AWAY

WhatsApp Business · Google Workspace and Microsoft 365 · Excel and Google Sheets · your CRM (HubSpot, Zoho, Pipedrive, GoHighLevel...) · Shopify and WooCommerce · Facebook and Instagram · e-invoicing · accounting systems · calendars and diaries · your ERP or whatever custom system you already have. **If it has a way to connect, it gets connected; and if it does not, the bridge gets built.**

Think of your Core as a workshop that **never turns off the lights.**

There is no "an AI" inside. There is a team, and each one has a trade:

→ **The agents** — each one does a job; they do not all do everything.

→ **The memory** — what happened yesterday is still there tomorrow.

→ **The trained skills** — your way of working, not a generic one.

→ **The specialists** — the one who quotes is not the one who writes.

→ **The manuals** — how things are done here, written down.

→ **The tools** — connected to the same place, not each one off on its own.

All inside the same Core. No specialist works alone: each one uses the memory and the rules of the business, instead of a generic AI **improvising from scratch every time**. That is the whole difference between "we tried AI" and "AI works here".

A loose AI is not a way of **working**.

What gives an agent judgement before it acts is not the model. It is all of this:

— Memory of your business

— Connections to your systems

— Living documentation

— Connected tools

— Trained skills

— Your own rules and context

— History and versions

— Specialised agents

That environment is built on whatever agent technology is current, and that changes: **it gets replaced and updated as the business needs**, without touching the Core. That is why the architecture matters and the fashionable tool does not — the tool expires, your memory and your rules do not.

An AI chat without this environment around it is not an automated company. It is a **consultation.**

The same applies on your team's side: we keep using **the tools they already know** — their WhatsApp, their spreadsheet, their invoicing system — because an automation that forces ten people to change program does not get adopted, it gets abandoned.

We are **two people**. And this is how we run all of it.

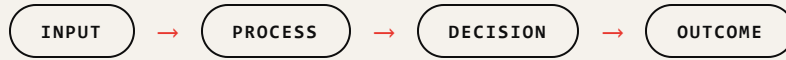
This manual is not consulting theory. It is the same Core we run our own company on. This is what two people keep going, every day:

01 Social media for several brands Calendar, publishing and replies to comments and messages — with the result of each piece measured afterwards, not assumed.	02 Websites with a live AI receptionist Sites where an assistant answers, explains, quotes and books at 3 in the morning exactly as it does at midday.	03 WhatsApp that actually answers It replies, quotes, books and hands the conversation to a human only when it genuinely needs to.
04 Quotes on the spot The customer puts their own budget together, at any hour, and arrives at the conversation already decided.	05 Prospecting that does not stop Search, filter and first contact every day — without anyone sitting down to do it by hand.	06 Seven sales channels open A daily sweep of opportunities on the platforms where work gets hired, with the proposal ready before the posting is even opened.
07 Content in continuous production Script, voice, video, subtitles and cover for a finished piece — no studio, no film crew.	08 Market research, daily What changed in the market, on social and in advertising gets reviewed every day and goes into the operation — not into a folder nobody opens.	09 The numbers in one place Every metric lands on the same dashboard, and out of it come three things that worked and three to fix, every week.
10 Watch over what already works Automatic checks that warn before something falls over or an access expires.	11 Memory of the whole operation Every decision, every client and every lesson is written down with its reason, and comes back in seconds.	12 Every trade, with its specialist Strategy, copy, design, data, finance and security: each area with someone trained for it.

And it does not fall over because the rules **are written once and followed always**, nothing gets forgotten between one conversation and the next, and what we learn today is applied backwards, to everything that came before. **Not by force of memory and willpower** — that collapses the day one of the two gets ill. It holds because it is ordered.

We do not have to invent anything to explain it to you:
it is what we do every day.

Every process reduces to **this map**.



Four questions, and they work in any department:

- 1 **What comes in?** — a WhatsApp message, a form, a call, an email, an invoice.
- 2 **What decision does a person make there?** — and with what information do they make it.
- 3 **What task repeats itself the same way, over and over?** — that is the one you delegate.
- 4 **What does the customer finally receive?** — and how long did it take them to receive it.

**If you can answer all four,
you can already automate **part of that process**.**

And if you cannot answer one of them, there is your pending work — and it is a matter of order, not of software.

Five steps, in this order. Skipping one **is expensive.**

01 Write down today's number, before you touch anything

How long you take to answer a WhatsApp message sent at nine at night. How many forms on your site went unanswered last week. How many days a quote takes. **Without that number you will not be able to prove it improved** — not even to yourself. Twenty real cases is enough.

02 Write the whole process down, start to finish

"A WhatsApp message comes in asking for a price → someone sees it when they can → they ask how many and by when → they look the price up in a spreadsheet → they put the quote together → they send it → three days later somebody remembers to chase." Written out like that, **you can already see where the customer is lost.**

03 Start where the money comes in

The temptation is to start with the internal stuff — payroll, inventory, reports — because it is a daily annoyance. But **the process that pays for itself fastest is the first one that touches the customer**: answering, quoting and following up. There, every hour of delay is a sale that left with whoever did answer.

04 Automate the whole process, not a slice of it

If the WhatsApp message gets answered on its own in a minute but the order is still copied by hand into the spreadsheet, and the invoice is done separately, **the bottleneck was not removed: it moved** — and now it reaches the person who was already overloaded, faster.

05 Leave the decision on the human side

What gets delegated is the repetitive: receiving, sorting, calculating with known rules, remembering, alerting. **Approving a discount outside the table, hiring, firing or diagnosing is still yours.** The machine prepares the complete information; you decide with it in hand.

AutomatizaIA Framework™

Five stages. The same order, always — including when the project looks simple.

A Analyse
Understand the real processes and the goals of the business — not the ones on the org chart, the ones that actually happen.

R Represent
Document flows, rules and the knowledge that today lives only in the heads of two or three people.

Q Break down
Split each process into automatable tasks — not the whole process in one go.

U Unify
Build the Core and its environment: memory, skills, integrations and agents, all connected.

I Improve
Measure, optimise and scale continuously — the architecture keeps getting better after handover.

From the assessment to a Core that is running: **01** Discovery · **02** Process map · **03** Core design · **04** Building the environment · **05** Agents and integrations · **06** Live automations · **07** Continuous optimisation.

Where it hurts, and what gets done in each case.

MANAGEMENT

- You cannot find the information when you need it.
- You check five systems to form an idea.
- Meetings and follow-ups get lost.

- A daily executive summary, already cross-checked.
- Intelligent reading of your inbox.
- Alerts, calendar and analysis of your indicators.

In one sentence: you stop chasing information — the information finds you. The hour you spend today assembling pieces becomes the hour you use to decide.

SALES

- Customers without timely follow-up.
- Slow quotes that cool the interest down.
- The same information captured several times.
- A CRM that has been out of date for weeks.

- First reply in under a minute, 24/7.
- Lead qualification and quoting with your rules.
- Follow-up that does not depend on someone remembering.
- Automatic logging, with no double entry.

In one sentence: the lead does not go cold because nobody had time to write to them. Every minute between interest and first reply is probability of closing that walks away.

MARKETING

It is not about generating posts — that is the basic part already. It is about spotting the opportunity before your competitor does: analysis of comments and of the competition, trends, reusing what already worked, and positioning so that both search engines and AI assistants find you, which is where more and more people are asking.

CUSTOMER SERVICE

— The same five questions, every day.

— Complaints that get lost between channels.

— Nobody knows what was promised to whom.

→ Support that answers and escalates when it should.

— Tickets, warranties and follow-ups with an owner.

— Satisfaction surveys that go out on their own.

OPERATIONS

— Real inventory does not match the system.

— Purchases ordered too late.

— Production and logistics with no warning when something slips.

→ Inventory that updates itself.

— Restock and maintenance alerts.

— The status of every order, without asking.

HR AND ADMINISTRATION

— Receiving and sorting candidates.

— Onboarding and frequent internal questions.

— Invoices and documents that read and record themselves.

— Collections, reconciliations and alerts without anyone pushing.

The seven mistakes that **cost the most**.

1 • Automating the mess

It looks like this: the process lives in somebody's head and everyone does it differently. **The fix:** write it down once and agree how it is done. Automating a mess multiplies it.

2 • Automating one task and calling it a process

It looks like this: the chat answers on its own, but the order is copied by hand into the spreadsheet, and from there into the invoice. **The fix:** follow the route until the data ends up where it belongs.

3 • Nobody owns it

It looks like this: it works, everyone uses it, nobody reviews it. **The fix:** a named person responsible, and a fixed moment to review it. With no owner it degrades on its own within two months.

4 • It fails in silence

It looks like this: the appointment reminder stopped going out three weeks ago and you find out through a complaint. **The fix:** make it retry, make it **warn you** if it does not go through, and make it record what failed and at what time.

5 • Letting the machine invent the price

It looks like this: it promises a price or a deadline the business cannot honour. **The fix:** the price is **calculated** from your table, never generated. Whatever is not in the table gets escalated to a person.

6 • An assistant that cannot say "let me check that"

It looks like this: it invents an answer, or denies a service you do provide. Both cost customers. **The fix:** define what it may assert, what it must ask, and what goes to a human — and test it with the uncomfortable questions.

7 • Starting with the big project

It looks like this: six months with nothing running, and the momentum dies before the first result. **The fix:** one complete process running in weeks, measured against the number from the start.

What level is your company at today?

LEVEL	SITUATION	WHAT TO DO NOW
1	Everything manual	Document the processes exactly as they happen today
2	Isolated tools	Integrate them with each other
3	Independent automations	Centralise them into a single Core
4	Core with AI	Optimise and tune the agents
5	AI-first company	Scale continuously

Most of the companies we talk to are at level 1 or 2 — and that is fine. The goal of this manual is not for you to jump to 5: it is for you to know exactly what your next step is, which is always the next one, not the last one.

15 TWENTY QUESTIONS TO PLACE YOURSELF

Answer each one with **0** (no), **1** (partly) or **2** (yes), and add them up.

01 Are your key processes written down anywhere?

02 Do you know how much time each one takes?

03 Do your systems talk to each other?

04 Does anyone answer a customer in under an hour?

05 Does your CRM reflect today's reality?

06 Can you put a report together without asking anyone for anything?

07 Do you have one single source of truth for your data?

08 Do you know which repetitive task eats the most hours?

09 Do invoicing and collections run without anyone pushing?

10 Do you measure the result of what you already automated?

11 Does your inventory update itself?

12 Does quoting take minutes or days?

13 Do you know which channel actually brings you customers?

14 Is onboarding for a new hire documented?

15 Do you have alerts when something goes wrong?

16 Do follow-ups depend on someone remembering?

17 Is more time spent looking for information than using it?

18 Could you serve twice as many with the same team?

19 Are you clear on what you should NOT automate yet?

20 Does anyone in your company own this question?

0-13 • Level 1-2 14-26 • Level 3 27-40 • Level 4-5

Your process map.

Ten minutes, **by hand**.

Write down what actually happens each week — not the org chart. **The first three rows are examples**, so you can see the level of detail: you name where the customer comes in and what happens next, step by step.

PROCESS, START TO FINISH	WHO DOES IT	TIMES / WK	HOURS / WK	WHAT BREAKS IF IT FAILS	NOW	LATER	NEVER
<i>A WhatsApp message comes in asking for a price → it gets quoted → someone chases 3 days later</i>	<i>Reception</i>	<i>40</i>	<i>6</i>	<i>The sale is lost</i>	<i>X</i>		
<i>They fill in the form on the site → it lands in an inbox → it gets copied into a spreadsheet</i>	<i>Sales</i>	<i>15</i>	<i>2</i>	<i>The customer waits a day</i>	<i>X</i>		
<i>The appointment is confirmed by phone the day before</i>	<i>Reception</i>	<i>30</i>	<i>3</i>	<i>The chair sits empty</i>	<i>X</i>		

NOW

It repeats the same way every week, follows clear rules, and an error gets caught in time. This is where the quick saving is.

LATER • NEVER

Later: it repeats, but it lives in somebody's head; it has to be ordered first. **Never:** deciding a price outside the table, hiring, firing or diagnosing — that is yours.

When you finish, keep a single row: the one that touches the customer and happens most often per week. That is where you start.

We build complete processes, not loose pieces.

Everything that follows is running today in real businesses — not in a prepared demonstration.

Answering and quoting 24/7

An assistant that understands what the customer needs — not a menu of buttons — replies in under a minute at any hour and puts the quote together. On your site and on your WhatsApp, with the same judgement on both sides.

A quote engine with your rules

The customer chooses and the price moves live with your real volume scale. It comes out of your table, not out of thin air: if you change the table, it changes on its own.

Follow-up that is never forgotten

Staggered reminders before the appointment or the due date, a second contact at 48 hours, and recovery of the conversation that went cold.

Flows between your systems

The data travels end to end on its own, with a retry when the other end fails, a warning when it does not go through, and a log of what happened.

A dashboard with one single truth

Your business numbers in one place and updated on their own, so you stop deciding with three different versions of the same figure.

Websites that work

Not a brochure: a site that answers, quotes and captures while you sleep, and that both search engines and AI assistants can find.

Documents that read themselves

Invoices, contracts and case files that come in, get read and get recorded without anyone transcribing them — and an assistant that answers citing the source.

A security review

If you published something built with AI tools, we check whether it holds up with real customers: findings, how to reproduce them, severity and the minimum fix.

HOW WE WORK

01 Assessment — 15 minutes, no card. You leave with a plan even if you do not hire us.

02 Design — in writing, what is included and what is not, before anything gets built.

03 Delivery — in days. You see it working before you release payment.

04 Support — 30 days included. And if something breaks, it says so on its own.



What could you resolve in the next 90 days?

That is the question worth answering before choosing any tool. Not "which AI do I buy", but which process you are going to leave resolved — and against which number you are going to measure it.

Three ways to start, today

1. **Write to the assistant at [automatizaia.app](mailto:hola@automatizaia.app)** — it answers instantly at any hour and puts a preliminary quote together in the same conversation. Along the way you see exactly what we build, working, live.
2. **Book the 15-minute assessment** from that same page. You leave with your processes ordered and a route, whether you hire us or not.
3. **Reply to me here** with the row that came out in your "Now" column. I will tell you in writing whether it can be resolved and how — and if I think it is not what suits you, I will tell you that too.

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