PAPER CRANE STUDIO

FREE GUIDE · AI FOR BUSINESS

5 AI automations every small business can set up *this week*

Step-by-step setups with copy-paste prompts. No coding and no new software to learn: just the AI assistant you already have, plus Gmail, Google Sheets and WhatsApp Business.

- Customer replies
- Invoices
- Lead follow-ups
- Meeting notes
- Content



Inside: 5 setups · 5 copy-paste prompts · a 7-day plan

Each one takes 10–30 minutes and keeps you in control: AI drafts, you approve.

BEFORE YOU START

Pick one. Set it up today.
Add the next one tomorrow.

What you need

- An AI assistant: ChatGPT, Claude or Gemini. A free plan is enough to try every setup here.
- A Google account (Gmail and Google Sheets).
- WhatsApp Business on your phone (free).
- *Optional:* Zapier or Make, to connect apps so things run on their own.

Three ground rules

- **You approve, AI drafts.** Read before anything goes to a customer.
- **Keep secrets out.** Never paste passwords, card or bank details into an AI chat.
- **Start with one.** One working automation beats five half-built ones.

The five, at a glance



01 Reply to customers in your voice
Drafts for emails, DMs and WhatsApp in seconds
~20 min setup



02 Invoices & receipts → spreadsheet
No more typing numbers into Excel
~15 min setup



03 Never miss a lead follow-up
A simple tracker plus personalised nudges
~30 min setup



04 Meeting → summary & action items
Clear next steps after every call
~10 min setup



05 One idea → a week of content
Reel script, captions, posts and status updates
~15 min setup

CUSTOMER MESSAGES

01 Reply to customers in your voice



Setup ~20 min | Tools: any AI assistant | Use: daily

Most replies answer the same ten questions. Teach your AI those answers and your tone once, then let it write the first draft every time.

1. Open a notes file and write **“About us”**: what you sell, prices or price ranges, delivery or service areas, timings, refund policy, and how you like to sound (formal, friendly, Hinglish...).
2. Add your **10 most common questions** with the answers you usually give.
3. Save it as a reusable assistant: a **Custom GPT** in ChatGPT, a **Project** in Claude or a **Gem** in Gemini. Paste the prompt below as its instructions and attach your notes.
4. When a message comes in, paste it in and get a ready-to-send draft. Edit, then send.

COPY-PASTE PROMPT

```
You are the customer-reply assistant for [BUSINESS NAME].
Use only the facts in the attached "About us" notes. If the
answer isn't there, say you'll check and get back, and never
guess prices, dates or policies.
Tone: [warm and friendly / formal], short sentences, max 80 words.
Reply in the same language the customer wrote in.
End with one clear next step (book, pay, visit, call).
Customer message:
"""[PASTE MESSAGE]"""
```

LEVEL UP

In Zapier or Make: new email or form enquiry → AI step drafts a reply with the prompt above → saved as a GMAIL DRAFT for you to review. You still press send.

WATCH OUT

Keep the notes updated. Most “AI got it wrong” moments are really old prices or policies in the notes.

ACCOUNTS

02 Invoices & receipts → spreadsheet



Setup ~15 min | Tools: AI assistant + Google Sheets | Use: weekly

AI assistants can read PDFs and phone photos of bills. Instead of typing each one into Excel, let the AI pull out the fields and give you rows to paste.

1. Create a Google Sheet with these columns: **Date · Vendor · Invoice no. · GSTIN · Amount before tax · GST · Total · Category**.
2. Once a week, collect that week's invoices: PDFs from email, or clear photos of paper bills.
3. Upload them to your AI assistant together with the prompt below.
4. Copy the table it returns and paste it into your sheet. Spot-check the totals against the bills.

COPY-PASTE PROMPT

```
Extract every invoice/receipt I've attached into ONE table with
these columns, in this order:
Date (DD/MM/YYYY) | Vendor | Invoice no. | GSTIN | Amount before
tax | GST | Total | Category
Rules: numbers only (no ₹ or commas). If a field is missing or
unreadable, write "CHECK". Category must be one of: Rent,
Software, Travel, Marketing, Supplies, Utilities, Other.
After the table, list any invoice you weren't sure about and why.
```

LEVEL UP

Zapier or Make: Gmail email with an attachment from a vendor → AI step extracts the fields → new row in Google Sheets automatically. Add a filter so only invoice emails trigger it.

WATCH OUT

AI can misread blurry photos. The “CHECK” rule makes it flag gaps instead of guessing, so always review those rows before filing taxes.

03 SALES Never miss a lead follow-up



Setup ~30 min | Tools: Google Sheets + WhatsApp Business + AI | Use: daily

Leads rarely say no. Most just go quiet because nobody followed up. A simple tracker plus AI-written nudges fixes most of that.

1. Make a Google Sheet: **Name · Phone · What they asked · Date · Status** (New / Followed up / Won / Lost). Add every enquiry from calls, DMs and walk-ins.
2. In **WhatsApp Business → Business tools**, turn on a **Greeting message** and an **Away message**, and save your top answers as **Quick replies** (type "/" to use them).
3. Every morning, filter Status = New and older than 2 days. Paste those rows into your AI with the prompt below.
4. Send each personalised follow-up and update the Status.

COPY-PASTE PROMPT

```
Write a short WhatsApp follow-up for each lead below.
For each: use their name, mention exactly what they asked about,
add one helpful detail or question that moves it forward, and end
with an easy yes/no question. Max 45 words, friendly, no pressure,
at most one emoji. Match the language they used with us.
Leads (Name | What they asked | Date):
[PASTE ROWS]
```

LEVEL UP

Zapier or Make, every morning: find rows where Status is "New" and Date is more than 2 days ago → email yourself the list, with AI-drafted follow-ups ready to copy.

WATCH OUT

Follow up two or three times, a few days apart, and then stop. Persistent is good; spammy loses the lead and can get your number reported.

OPERATIONS

04 Meeting → summary & action items



Setup ~10 min | Tools: a transcript + AI assistant | Use: after every call

The value of a meeting is the decisions and who does what next. AI turns a messy transcript into a clean recap your team and clients will actually read.

1. Get a transcript. Use your meeting tool's transcript feature if your plan has one, or record on your phone **with everyone's permission** and transcribe it.
2. Paste the transcript into your AI assistant with the prompt below.
3. Check the owners and dates, then send the recap on email or WhatsApp within the hour, while it's fresh.

COPY-PASTE PROMPT

```
From this meeting transcript, write:
1. A 3-line summary of what was discussed.
2. Decisions made (bullets).
3. Action items as a table: Task | Owner | Due date.
   If an owner or date wasn't said, write "TBD"; don't invent one.
4. Open questions we still need to answer.
Keep it under 200 words. Transcript:
"""[PASTE TRANSCRIPT]"""
```

LEVEL UP

Keep a running “Client log” doc per client and paste each recap at the top. Before the next call, ask the AI: “Summarise where we are with this client and what's overdue.”

WATCH OUT

Always ask before recording, and don't put confidential client documents into tools your company hasn't approved.

05 MARKETING One idea → a week of content



Setup ~15 min | Tools: AI assistant | Use: weekly

Posting regularly beats posting perfectly. Start from one real thing that happened in your business this week and let AI turn it into every format you need.

1. Every Monday, write 3–4 lines about one real moment: a customer question, a behind-the-scenes story, a new product, a mistake you fixed.
2. Run the prompt below, using the same assistant you set up in Automation 01 so it already knows your voice.
3. Edit lightly so it sounds like you, then schedule the posts across the week.

COPY-PASTE PROMPT

```
Here is one real moment from our business this week:
"""[YOUR 3-4 LINES]"""
Turn it into:
- A 30-second Instagram Reel script: hook in the first line,
  3 short beats, end with a question for comments
- An Instagram caption (max 120 words) + 5 relevant hashtags
- A LinkedIn post (max 150 words, practical takeaway)
- 2 WhatsApp Status lines
- A 3-line email for our customer list
Keep our facts exactly as written. Don't add claims or numbers.
```

LEVEL UP

Keep a “Content ideas” sheet where your team drops one line whenever a customer asks something interesting. You'll never run out of real topics.

WATCH OUT

AI is great at format and terrible at truth about your business. Never post a stat, price or claim it made up.

MAKE IT STICK

Your 7-day plan

MON
Write your “About us” notes and set up the reply assistant (01).

TUE
Use it on every customer message today. Fix gaps in the notes.

WED
Create the invoice sheet and run last week's bills (02).

THU
Build the lead tracker and set up WhatsApp Business replies (03).

FRI
Send AI-drafted follow-ups to every “New” lead.

SAT
Recap one meeting with the summary prompt (04).

SUN
Turn one moment into next week's content (05).

5 mistakes to avoid

- **Letting AI send without review.** Drafts first, always, until you fully trust a setup.
- **Vague prompts.** “Write a reply” gives generic text. Your facts, your tone and a word limit give usable text.
- **No single source of truth.** Keep prices and policies in one notes file and update it there.
- **Automating a broken process.** If follow-ups are messy by hand, fix the tracker first, then automate.
- **Pasting sensitive data.** Leave out card numbers, passwords, Aadhaar and PAN details, and client contracts.

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DONE-FOR-YOU

Want us to set this up for you?

We're a creative growth studio in Bengaluru. We design and build AI automations, agents and integrations wired into your inbox, CRM and tools, with humans in the loop, so your team spends its time on real work.

Tell us where the busywork piles up. We'll map it, prototype the first automation, and hand it over working.

Fold a brief →

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