AI Systems Assets 2026

For Solo & Small Service Businesses (UK + Global)

Checklist | Course Waitlist | Consulting Offer

Prepared for: Dr Steven Sam

February 2026

Contents

How to use this document

Use the checklist to choose a minimal tool stack and implement three core workflows. Then publish the course one-pager as your waitlist landing page and use the consulting outline as your high-intent conversion page.

1. 2026 AI Stack Checklist

Purpose: Build a small, stable AI-enabled stack for a service business (1-20 people) that reliably runs three workflows: lead capture, follow-up, and proposals/onboarding.

Who this is for

- Solo founders and small teams selling services (consultants, coaches, accountants, agencies, trainers, freelancers).
- Businesses that want practical AI workflows with human review (no risky auto-send).
- UK + global audiences (supports time zones and multiple currencies).

A. Your 3 Core Workflows

Workflow 1 - Lead Capture (Enquiry -> Actionable Lead)

☐ Lead captured (form/email/DM routed into one system).
☐ Lead summarised in a standard format (situation, goal, constraints, next step).
☐ Lead scored so you know who to call first.
☐ Lead stored in a single source of truth (CRM or spreadsheet)
☐ You are notified with a recommended next action.

Definition of done: A new enquiry becomes a clean record in under 2 minutes with a clear next action.

Workflow 2 - Follow-Up (Enquiry -> Booked Call)

☐ Instant acknowledgement sent (or drafted) within minutes.
☐ Follow-up sequence exists (7 messages over 10–14 days)
☐ Booking link offered at the right time
☐ Stop rules exist (to avoid chasing)

Definition of done: No lead falls through the cracks due to silence.

Workflow 3 - Proposals + Onboarding (Call -> Proposal -> First 7 Days)

☐ Call notes are captured consistently.
☐ Proposal is drafted from a standard template (scope, timeline, price, next steps)
☐ Scope-control language is included to prevent creep.
☐ Onboarding pack is sent (welcome, checklist, comms rules, kickoff).

Definition of done: Proposals go out quickly and onboarding feels professional and consistent.

B. The 7 Tool Categories

Choose one tool per category. Think categories, not brands.

Category	Purpose	Used in workflows
1) Capture	Forms / landing pages where leads enter your system	1

2) Communication	Email as primary channel; optional messaging	1, 2, 3
3) Booking/Calendar	Scheduling with time zones and reminders	2, 3
4) Docs	Proposals, scopes, onboarding docs, templates	3
5) Storage / Knowledge base	SOPs, reusable assets, client-safe notes	1, 3
6) Automation	Connect tools and trigger the workflows	1, 2, 3
7) AI Assistant	Drafting + summarising (human review)	1, 2, 3

Rule: If a tool does not support at least one workflow above, do not add it.

C. Minimum Viable Stack

- Capture: one simple intake form
- Single source of truth: a spreadsheet or basic CRM
- AI assistant: summaries and draft follow-ups
- Add booking and automation only after the basics are reliable

D. Decision Tree - Pick Tools Without Overthinking

Step 1 - Where do your leads come from?

- Referrals / inbound emails or DMs -> prioritise CRM + follow-up system
- Website / ads / content -> prioritise form + lead scoring + fast response
- Outbound -> prioritise lead list + personalised follow-up drafts + booking

Step 2 - What is your biggest bottleneck right now?

- Missing leads -> build Workflow 1
- People ghost -> build Workflow 2
- Proposals take too long -> build Workflow 3

Step 3 - How sensitive is your client data?

- Low: general enquiries -> standard safe rules
- Medium: private business info, contracts, financial context -> anonymise + strict review
- High: health, legal, IDs, minors -> minimise AI input and use extra caution

Step 4 - Automation approach

- Beginner: drafts + reminders (no auto-send)
- Intermediate: automated routing + templated drafting
- Advanced: conditional flows, segmentation, dashboards

E. Setup checklist (do these in order)

1. Define your one-line offer: 'I help [who] achieve [outcome] using [service] in [timeframe].'
2. Create your intake form (5 fields): outcome goal, timeline, budget range, situation, best next step.
3. Standardise your AI summary output: situation, goal, constraints, next step, 2 follow-up questions.
4. Build a simple lead scoring rule (5 factors): budget fit, urgency, clarity, readiness, complexity fit.
5. Install your follow-up sequence (7 messages over 10–14 days).
6. Install booking hygiene: time zones, reminders, reschedule links, pre-call questions.
7. Create proposal and onboarding templates (scope, timeline, pricing, next steps).

F. Safe-Use Rules (SMB Edition)

Never paste into AI tools:

- Full ID numbers, payment details, passwords
- Medical or legal sensitive details
- Client confidential documents verbatim (unless you have explicit permission and understand the terms)

Do instead:

- Use placeholders (e.g., 'Client A', 'Company B')
- Summarise rather than upload raw documents
- Keep a human review step before sending anything externally

G. Quick Self-Audit

Area	Score (1-5)
Lead captured reliably	
Follow-ups happen consistently	
Proposals go out within 24-48 hours	
Onboarding is standardised	
Data handling is safe and consistent	

Tip: Your lowest score is your next workflow to fix.

2. Course / Waitlist One-Pager

AI Systems for Solo & Small Service Businesses - Build an end-to-end client system: leads -> booked calls -> proposals -> onboarding -> delivery.

Outcome promise

- Capture and qualify leads automatically (with clear next steps).
- Book more calls with professional follow-up and booking hygiene
- Create proposals faster with clear scope control
- Onboard clients consistently with repeatable templates
- Save hours weekly with safe, repeatable workflows

Who it is for

Solo founders and small teams (1–20) who sell services and want simple systems - not hype.

What you will build (Modules)

Module 1 - Foundation & Safe AI Setup

- Offer clarity + workflow map
- Safe-use rules + human-in-the-loop design
- Minimal stack selection

Module 2 - Lead Capture & Qualification

- Intake form + lead scoring
- AI lead summary
- CRM setup + routing
- Response-time system

Module 3 - Follow-Up & Booking Engine

- 7-message follow-up system
- Booking hygiene + no-show reduction
- Pre-call questionnaire + call prep brief

Module 4 - Proposals, Scope & Onboarding

- Proposal generator workflow
- Scope control + change requests
- Onboarding pack + first 7 days checklist

Module 5 - Operations Automation

- Inbox triage (drafts + review)
- Weekly client updates from notes
- SOP library + ops copilot basics

What you get (Assets)

- Template library (forms, scripts, proposal + onboarding packs)
- Prompt library (summaries, proposals, follow-ups)
- Workflow diagrams + setup checklists
- Safe AI for SMBs checklist

Support options

- Self-paced (templates + videos)
- Optional group Q&A sessions (monthly)
- Optional implementation sprint add-on

Waitlist call to action

Join the waitlist and get the free starter pack: AI Stack Checklist, intake form + lead scoring sheet, and a 7-message follow-up sequence.

Link: https://fintechtuts.com/template-form/

What is your biggest bottleneck right now (leads, follow-up, proposals, onboarding, admin)?

3. Consulting Offer Outline

AI Systems Implementation for Service Businesses - Workflow audit -> build -> deploy -> train your team.

Who it is for

You are a fit if:

- Leads are inconsistent or slipping through
- Follow-up is manual and messy
- Proposals take too long or scope creep is common
- You want AI automation but worry about data and privacy
- You want implementation done correctly - not DIY forever

Packages

Package	Best for	Duration	Includes	Deliverable	Suggested price band
A) AI Workflow Audit	Clarity before building	60-90 min + plan	Workflow diagnosis; stack review; 30-day plan; safe-use risk flags	AI Systems Roadmap PDF	GBP 250-750
B) Done-With-You Implementation Sprint	Get a live system fast	2-4 weeks	Workflow 1+2 build; templates; automation w/ review; training + SOP handover	Working system + SOPs	GBP 1,000-3,500
C) Done-For-You Systems Build	End-to-end implementation	4-6 weeks	All 3 workflows; dashboard; training; safety-first configuration	Installed system + training	GBP 3,500-10,000+

Optional retainer

Optimisation & Governance Retainer (monthly)

- Monthly performance review (response time, booking rate, proposal cycle time)
- Workflow tuning + new automation requests (capped hours)
- Safety checks, prompt updates, template improvements

Consulting page description

I help solo and small service businesses implement practical AI workflows that increase bookings and reduce admin - without risky automation. We identify your highest ROI bottleneck and install a simple system with standardised templates, automation with human review, safer AI practices, and documentation your team can run.

Application questions

- What service do you sell and who is your ideal client?
- What is your biggest bottleneck right now? (leads / follow-up / proposals / onboarding / admin)
- Approximately how many leads do you get per week or month?
- What tools do you currently use? (forms, email, calendar, docs, CRM)
- Any sensitive data considerations? (finance, legal, health, etc.)
- What would success in 30 days look like?

Links

Free checklist/templates: https://fintechtuts.com/template-form/

Course/waitlist: https://fintechtuts.com/ai-course/

Consulting application: https://fintechtuts.com/consulting-offer/