

SMALL BUSINESS AUTOPILOT

Free Sample: 2 AI Automations

Missed-Call Text Back & Google Review Requests —
from the Small Business Autopilot pack

Set up in an afternoon. No code.

Built for local service businesses, solo consultants, small e-commerce shops and agencies. No coding required.

02

Missed-Call Text Back

04

Google Review
Requests

What's inside

Two complete automations from the full Small Business Autopilot pack — free.

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About the estimates. Time-saved figures in this pack are estimates based on the stated assumptions (volume × minutes per task), not measured results. Your numbers will differ — the simplest way to know is to note how long a task takes you today.

Quick start

Get your first automation live in an afternoon. Don't try to build all twelve this week.

- 1 Pick ONE automation.** Start with the one that hurts most. For most service businesses that's #1 Instant Lead Follow-Up or #2 Missed-Call Text Back. Build one, run it for a week, then add the next.
- 2 Choose your tool.** Never automated anything? Use Zapier. Comfortable with flowcharts and want lower cost at volume? Use Make. Have a technical friend or want to self-host? Use n8n. All three have free tiers; check each vendor's current pricing page before committing.
- 3 Get an AI API key.** The AI steps need an API key from OpenAI (platform.openai.com) or Anthropic (console.anthropic.com). This is separate from a ChatGPT/Claude subscription and is billed per use. Zapier users can skip this by using the built-in AI by Zapier step.
- 4 Fill in your Business Profile once.** Copy the Business Profile block (next page) into a note. Most prompts in this pack start with it so the AI writes like your business, not like a robot.
- 5 Start in 'draft' mode.** For anything customer-facing, have the automation create a draft or send it to you first. Switch to auto-send only after you've read a couple of weeks of output and trust it.
- 6 Test with yourself.** Submit your own form, call your own number, leave a test entry. Check every step's output before turning it on.

How to read the setup steps. Each automation shows the same workflow built three ways: **Zapier** (easiest), **Make** (cheaper at volume, more visual), and **n8n** (self-host or cloud, most flexible). Pick one tool — you don't need all three. App, trigger and action names were checked against each vendor's published integration lists in October 2026. Vendors rename things; if a name differs slightly, search the step picker for the key word (e.g. "review", "invoice", "row").

Trigger	The event that starts the automation (a new form entry, a missed call, a new review).
Action	Something the automation does (send an email, add a row, post a reply).
Mapping	Inserting data from an earlier step into a later one, shown in this pack as {{Field Name}}.
[BRACKETS]	Something you fill in once, by hand, when you set up (your business name, your tone).
AI step	ChatGPT (OpenAI) > Conversation or AI by Zapier in Zapier; OpenAI > Generate a response in Make; the OpenAI or Basic LLM Chain node in n8n. You can swap in Claude (Anthropic) or Gemini (Google) — the prompts work the same.

Your Business Profile

Fill this in once. Paste it at the top of every prompt marked [PASTE BUSINESS PROFILE] — it's the single biggest thing that makes AI output sound like you.

COPY THIS

BUSINESS PROFILE (paste at the top of any prompt)

Business name: [Your Business Name]

What we do: [one sentence, e.g. "Residential plumbing repair and water-heater installs in Boise, ID"]

Who we serve: [e.g. "homeowners and small landlords"]

Service area / hours: [e.g. "Ada County, Mon-Sat 7am-6pm"]

Booking link: [https:// ...]

Phone: [555-555-5555]

Tone: [e.g. "friendly, plain-spoken, no jargon, no exclamation-mark overload"]

Sign-off name: [e.g. "Maria at Acme Plumbing"]

Never say: [e.g. "never quote prices, never promise same-day service, never give legal/medical advice"]

Play it safe

- **Texting customers (US):** business texting through Twilio and similar services requires A2P 10DLC registration, and you should only text people who gave you their number and expect to hear from you. Include opt-out language ("Reply STOP to opt out") in recurring messages. Rules vary by country — check yours.
- **Email:** marketing email needs an unsubscribe option under CAN-SPAM (US) and similar laws elsewhere. One-to-one replies and transactional reminders are generally treated differently, but don't add people to newsletters without consent.
- **Google reviews:** Google's policy prohibits offering incentives for reviews and selectively asking only happy customers ("review gating"). The review automation in this pack asks every completed customer the same way.
- **AI output:** AI can be confidently wrong. Never let it quote prices, promise dates, or give legal, medical or financial advice on your behalf. Keep a human in the loop for anything that matters.
- **Privacy:** only send the data the AI step needs. Don't paste payment details, passwords or health information into prompts.

This pack is general guidance, not legal advice. Check the current terms of each app you use and the rules where you operate.

02

SALES

Missed-Call Text Back

BEST FOR

Trades, salons, clinics, anyone who can't always pick up

TRIGGER

An incoming call to your business number that isn't answered (status "no-answer" or "busy").

SETUP TIME (ESTIMATE)

45–90 min (plus carrier registration time)

DIFFICULTY

Medium

The problem. You miss a call while you're under a sink or with a client. Many callers won't leave a voicemail — they just call the next business on the list.

You'll need: Twilio phone number (or a phone system with a missed-call trigger, e.g. Nextiva, RingCentral, Dialpad, OpenPhone/Quo), Zapier / Make / n8n, Google Sheets (optional)

Time saved — Estimate: 15–30 minutes/week of call-backs and phone tag. The real value is recovering callers who would otherwise go elsewhere — track it in the sheet to see your own numbers.

Setup

ZAPIER

- 1 Trigger: **Twilio > New Call** (fires when a call to your Twilio number finishes). If you use Nextiva, RingCentral, Dialpad or OpenPhone/Quo, look for that app's missed-call or call-completed trigger instead.
- 2 Action: **Filter by Zapier** — only continue if *Call Status* is `no-answer` or `busy` (or *Duration* is less than 10 seconds).
- 3 Action: **Twilio > Send SMS** to `{{From}}` using Template 2A.
- 4 Action: **Google Sheets > Create Spreadsheet Row** (time, caller number) so you can call back in order.
- 5 Optional: **Gmail > Send Email** or **Slack > Send Direct Message** to yourself: "Missed call from `{{From}}` — auto-texted."

MAKE

- 1 In Twilio, set your number's *call status callback* URL to a **Webhooks > Custom webhook** in Make.
- 2 Add a filter on the link: `CallStatus` equals `no-answer` OR `busy`.
- 3 Module: **Twilio > Create a Message** (send SMS) to `From` with Template 2A.
- 4 Module: **Google Sheets > Add a Row** to a 'Missed calls' sheet.

- 1 **Webhook** node; paste its URL as the status callback on your Twilio number.
- 2 **IF** node: `CallStatus` is `no-answer` or `busy`.
- 3 **Twilio** node > Send SMS to `From` with Template 2A.
- 4 **Google Sheets** node > Append row.

Copy-paste AI prompt

PROMPT 2A · OPTIONAL: AI REPLY TO THEIR TEXT-BACK RESPONSE

[PASTE BUSINESS PROFILE]

A caller we missed replied to our auto-text. Draft a short SMS reply (under 300 characters) from [Sign-off name].

Their text: `{{Incoming Message}}`

Rules: friendly, plain language, no prices, no promises about arrival times. If they describe an emergency (gas smell, flooding, injury), tell them to call 911 or the relevant emergency line first. Otherwise offer the booking link [Booking link] or say we'll call them back shortly.

Message templates

TEMPLATE 2A · MISSED-CALL TEXT

Hi, this is [Business Name] – sorry we missed your call! We're probably with a customer. What can we help with? Reply here or book online: [Booking link]. Reply STOP to opt out.

TEMPLATE 2B · AFTER-HOURS VERSION

Thanks for calling [Business Name]. We're closed right now (hours: [hours]) but we'll call you back first thing. Want to skip the wait? Book here: [Booking link]. Reply STOP to opt out.

Guardrails & tips

- US texting via Twilio needs A2P 10DLC registration before messages will deliver reliably — start that first; it can take days.
- Use Paths by Zapier (or a Router in Make) to send 2B outside business hours.
- Keep the AI reply (2A) in draft/notify mode — texting is personal.

04

REPUTATION

Google Review Requests

BEST FOR

Local service businesses, clinics, restaurants, shops

TRIGGER

A job is marked complete (a status change in your CRM/field-service app, a paid invoice, or a row in a sheet).

SETUP TIME (ESTIMATE)

20–40 min

DIFFICULTY

Easy

The problem. Happy customers rarely leave reviews unless asked — and asking manually after every job is easy to forget.

You'll need: Your job/CRM tool (Jobber, Housecall Pro, HubSpot, a Google Sheet...) or QuickBooks paid invoices, Twilio or Gmail, Your Google review link

Time saved — Estimate: 20–40 minutes/week if you complete ~15–20 jobs a week and ask each customer by hand. Review volume depends on your customers — track it monthly.

Setup

ZAPIER

- 1 Get your review link: in your Google Business Profile, choose *Ask for reviews / Get more reviews* and copy the short link.
- 2 Trigger: **QuickBooks Online > New Paid Invoice**, or your CRM's job-completed trigger (e.g. **HubSpot > Deal Stage Changed / Google Sheets > New or Updated Spreadsheet Row** where status = Complete).
- 3 Action: **Delay by Zapier > Delay For** 2 hours (so the ask arrives after you've left, not while you're packing up).
- 4 Action: **Twilio > Send SMS** with Template 4A, or **Gmail > Send Email** with Template 4B.
- 5 Optional: **Delay For** 4 days → one reminder (4C). Stop there — one reminder is plenty.

MAKE

- 1 Module: your trigger (**QuickBooks > Watch Invoices**, **HubSpot CRM > Watch Deals**, or **Google Sheets > Watch Rows**) + filter: status = Complete/Paid.
- 2 Module: **Tools > Sleep** only handles short waits, so instead add the customer to a 'Review queue' sheet with a send-at time, and run a second scenario every hour that sends due rows via **Twilio > Create a Message** or **Gmail > Send an email**.

- 1 Trigger node for your tool (e.g. **QuickBooks Online Trigger**, **HubSpot Trigger**, **Google Sheets Trigger**).
- 2 **Wait** node (2 hours).
- 3 **Twilio** › Send SMS or **Gmail** › Send with Template 4A/4B.

Copy-paste AI prompt

PROMPT 4A · PERSONALISE THE ASK FROM JOB NOTES (OPTIONAL)

[PASTE BUSINESS PROFILE]

Write a 1-sentence personal opener for a review request, based on these job notes. Mention the specific job naturally. Do not mention stars, ratings, rewards or discounts. Under 25 words.

Customer first name: {{First Name}}

Job notes: {{Job Notes}}

Message templates

TEMPLATE 4A · SMS ASK

Hi {{First Name}}, thanks for choosing [Business Name] today! If you have a minute, an honest Google review really helps a small business like ours: [Review link]. Reply STOP to opt out.

TEMPLATE 4B · EMAIL ASK

Subject: How did we do, {{First Name}}?

Hi {{First Name}},

Thanks again for having us out for {{Job Type}}. If you have a minute, would you share an honest review on Google? It helps neighbours find us and tells us what to keep doing (or fix).

[Review link]

[Sign-off name]

TEMPLATE 4C · ONE GENTLE REMINDER

Hi {{First Name}}, just a quick nudge in case the link got lost – [Review link]. No worries if you're busy. Thanks! – [Business Name]

Guardrails & tips

- Ask every customer the same way. Don't send only 'happy' customers to Google and others to a private form — Google treats that as review gating.
- Never offer discounts or gifts in exchange for reviews.

THAT WAS 2 OF 12

Get the other ten automations

The full **Small Business Autopilot** pack adds Instant Lead Follow-Up, Invoice & Payment Reminders, Google Review Replies, Appointment Reminders, Client Onboarding, Weekly Reporting, Social Repurposing, Inbox Triage, FAQ Reply Drafts and Proposal Drafting — plus a prompts file and a message-templates doc you can copy from directly.

Get the full pack — \$19

smallbizautopilot.gumroad.com//ai-automation-templates

Rather have it set up for you? Done-for-you setup is available — [email heyjax@mail.grokbots.com](mailto:heyjax@mail.grokbots.com)