

◇ The Business Growth Playbook

AI Agents 247

A practical workbook for profitable growth, clear delivery, and founder freedom.

Identifying and resolving bottlenecks in your business to perform at 10x level

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◇ Our operating ambition

The business we want to build

A focused company that helps businesses attract and handle relevant WhatsApp inquiries through AI-assisted marketing and clearly scoped delivery.

Clear customer value

Customers understand what they receive. We measure commercial outcomes, not activity alone.

Repeatable, profitable delivery

Documented processes create contribution without overwhelming the founder.

AI assistance supports the work. An accountable human team owns delivery and decisions.

How to use this workbook

Decisions and implementation matter more than discussion.

01	02	03
Review the current situation	Complete the exercise	Choose one priority
04	05	06
Assign an owner	Define completion evidence	Review results before expanding

Workshop date: _____ Participants: _____ Next review: _____

◇ Compact roadmap

The six growth phases

01 Founder capacity

02 Customer and offer clarity

03 Repeatable customer acquisition

04 Delivery and retention

05 Leadership and decision ownership

06 Culture and long-term direction

Build evidence phase by phase. This is a sequence of capabilities, not a day-by-day schedule.

Starting point: the numbers we don't know yet

Record the period and source for each number. Leave unknowns blank until verified.

Baseline measure	Actual	Baseline measure	Actual
Active paying customers	_____	Monthly recurring revenue	_____
Average monthly fee	_____	Monthly direct delivery costs	_____
Founder hours per week	_____	New customers acquired	_____
Customers lost	_____	Cash available for operating expenses	_____

“Reliable decisions begin with an honest baseline.”

Period: _____ Sources: _____ Verification owner: _____



◇ Phase 1 · Founder capacity

Free founder time for sales, partnerships, and decisions

Increase time available for high-value work.

To validate · likely time drains

- Repeated manual app fixes
- Routine onboarding follow-ups
- Ad hoc creative revisions
- Unstructured support
- Switching between unrelated offers

Which recurring task consumes the most founder time today?

The founder's highest-value work

◇ Founder-led priorities

- Qualified sales conversations
- Strategic relationships
- Offer and scope decisions
- Hiring or selecting key delivery owners

◇ Work suitable for transfer

- Routine reminders
- Draft reports
- Scheduling coordination
- Input collection
- Standard account checks

Actual delegation depends on cash, readiness, and process quality.

Weekly time audit

Record the real week before designing the future one.

Task	Hours / week	Business outcome	Founder judgment?	Keep / stop / automate / delegate	Future owner
Sales meeting with a qualified prospect	_____	_____	_____	_____	_____
Repeated reminder for missing client assets	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

The two task descriptions are illustrative. Their hours and decisions remain blank.

Delegation economics

Weigh the full transfer cost, hours genuinely saved, expected quality, supervision required, and the value of replacement work.

◇ Illustrative example

AED 600

Monthly transfer cost

8 hours

Founder time saved per month

AED 75

Effective cost per hour saved

$$\text{Cost per hour saved} = \frac{600}{8} = 75 \text{ AED}$$

Saved hours do not automatically generate revenue. Decide what work will replace the transferred task.

The first transfer plan

◇ Proposed example · Client onboarding reminders

Collect missing onboarding information. AI prepares reminders and detects missing fields.

The delivery coordinator owns follow-through. The founder handles exceptions only.

01
Document the process

02
Prepare templates

03
Run a supervised handover

04
Measure errors and time saved

Our actual first task: _____

Owner: _____ Success evidence: _____ Review: _____

A protected founder week

Activity	Hours	Activity	Hours
Sales conversations	_____	Networking and partnerships	_____
Offer improvement	_____	Delivery oversight	_____
Product decisions	_____	Administration	_____
Unallocated buffer	_____	Total planned hours	_____

Time recovered through delegation: _____

Highest-value use of recovered time: _____

Protect selling time without removing delivery oversight or the buffer needed for exceptions.

◇ Evidence gate

Phase 1 completion check

- ☐ Time audit completed
- ☐ One low-value recurring task removed or transferred
- ☐ One process documented
- ☐ Selling time protected
- ☐ Time saved measured

What work am I still doing because it feels familiar?

Use evidence of a completed transfer, not a plan to delegate.

Decision: _____ Owner: _____ Review date: _____

◇ Phase 2 · Customer and offer clarity

Make the customer, offer, and value obvious

Make it immediately clear who AI Agents 247 serves, what it delivers, and how customers judge value.

Customer · Problem · Offer · Scope · Measurement

Don't add services just to make packages look larger.



Our core customer problem

◇ To validate · Customer hypothesis

Business owners struggle to generate a consistent flow of relevant inquiries and identify which marketing activity produces business.

Symptoms

Low inquiry volume, inconsistent messaging, and unclear attribution.

Possible causes

A weak offer, poor targeting, unsuitable creative, slow replies, or weak follow-up.

More advertising cannot fix every cause.

Ideal customer selection

Score each criterion from 1–5 and record the reason.

Customer-fit criterion	Score	Evidence / question
Clear service or product	_____	_____
Known service area	_____	_____
Sufficient profit per sale	_____	_____
Ability to fund a test	_____	_____
Fast inquiry response	_____	_____
Capacity to accept more business	_____	_____
Willingness to share outcome data	_____	_____

The score is a discussion aid, not a validated prediction model.

The first customer segment

◇ To validate · Candidate sectors

Sector	Typical need	Inquiry measurement	Delivery complexity	Questions to validate
Home services	Service requests	Tag job inquiries	Area and availability	Which jobs are profitable?
Automotive services	Bookings or quotes	Link inquiry to booking	Service and vehicle fit	Who confirms bookings?
Professional services	Relevant consultations	Track qualified meetings	Qualification and claims	What makes a lead suitable?
Property-related services	Relevant service inquiries	Record inquiry source	Offer and location detail	What outcome is traceable?

Selected pilot sector: _____ Reason: _____

Working hypotheses only. Validate needs, measurement, and complexity in conversations.

The one-sentence offer

◇ Proposed wording

“We help [specific business type] attract relevant WhatsApp inquiries through AI-assisted advertising, with clear monthly deliverables and performance tracking.”

We serve: _____

Their main problem: _____

Our core deliverable: _____

How we measure progress: _____

No guaranteed performance claims.

A simple service ladder

◇ Proposed · Responsibility and scope, not fixed prices

AI-guided self-service

The customer performs the work with AI guidance.

Receives access and guidance within agreed limits.

Separate scope for human execution or management.

Managed campaign delivery

An accountable human team manages agreed campaign work.

Receives defined delivery and reporting.

Separate scope for additional work or platforms.

Expanded managed delivery

The team owns a broader, explicitly agreed scope.

Receives documented additional services.

New commitments still require scope approval.

Final package names, prices, and inclusions require confirmation. Ad spend is separate from service fees.

Credits and service limits

Credits fund creative generation. Customers can buy additional credits; generation costs vary by format and model.

Activity	Depends on credits?	Service agreement / limit to confirm
Creative generation	Yes	Format, model, usage: _____
Human editing	Not defined by credits	Human review scope: _____
Campaign management	Not defined by credits	Management scope: _____
Additional platforms	Generation may use credits	Platform scope: _____
Ad spend	No	Separate approved budget: _____

Human review and management require defined scope. Credits do not imply unlimited human service.

The offer audit

Use the same period for revenue, costs, and delivery hours.

Offer or service	Revenue	Direct cost	Contribution	Delivery hours	Customer demand	Keep / simplify / pause
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Which offer produces the strongest contribution with the most repeatable delivery?

The client promise and its boundaries

What we commit to

- Agreed deliverables
- Clear ownership
- Transparent reporting
- A defined review process

What affects results

- Offer quality and audience demand
- Ad budget
- Client response speed
- Client sales process

Proposed client responsibility checklist

- | | |
|--|---|
| ☐ Provide accurate inputs and approvals | ☐ Respond to inquiries |
| ☐ Confirm access and ad budget | ☐ Share sales outcome data |

◇ Evidence gate

Phase 2 completion check

- ☐ Pilot customer segment selected
- ☐ Core problem validated in conversations
- ☐ One-sentence offer written
- ☐ Scope and exclusions documented
- ☐ Credits explained clearly
- ☐ Client responsibilities agreed
- ☐ Pricing confirmed separately

**What can we remove without
reducing customer value?**

Clarity is a condition for acquisition, not a cosmetic exercise.

◇ Phase 3 · Repeatable customer acquisition

Build a measurable way to win customers

Create a process for attracting, qualifying, and converting customers.

Networking and referrals · Useful inbound content · Controlled paid acquisition tests

Choose a manageable initial channel mix.



The customer acquisition journey

◇ Proposed process · Assign actual names before use

Stage	Entry condition	Required next step	Owner
Initial contact	Relevant contact identified	Agree permission to continue	_____
Qualified conversation	Fit and need discussed	Book discovery if suitable	_____
Discovery meeting	Meeting accepted	Confirm problem, scope, measurement	_____
Proposal	Suitable scope identified	Review terms and decision	_____
Payment	Proposal accepted	Confirm payment status	_____
Onboarding	Commercial start confirmed	Collect inputs; agree milestone	_____

Keep the process simple enough for a small team to update after every meaningful interaction.

Networking that creates follow-up

◇ Proposed event workflow

“We help businesses increase revenue with AI by identifying bottlenecks and resolving them.”

1 Choose relevant business-owner events

2 Use a short introduction

3 Ask about one commercial bottleneck

4 Offer a relevant next conversation

5 Record permission and the agreed follow-up

Not every attendee is a qualified prospect. Use the introduction to open a discussion, not promise a result.

A short discovery conversation

How do customers find you today?

Which service do you most want to sell?

What is a new customer worth in gross profit?

How quickly do you reply to inquiries?

How many additional customers can you serve?

How will we know a test is worthwhile?

Qualification notes: _____

Content that supports sales

◇ Proposed content mix

Useful answers to customer questions

Clear explanations of the service

Practical demonstrations

Verified case studies, when available

Objection handling

Instagram and TikTok

These are the intended priorities. Any other channel is proposed expansion.

—

Judge content by the sales conversations it supports.

No promises of viral reach or AI-search recommendations.

A controlled paid acquisition test

◇ Proposed test design

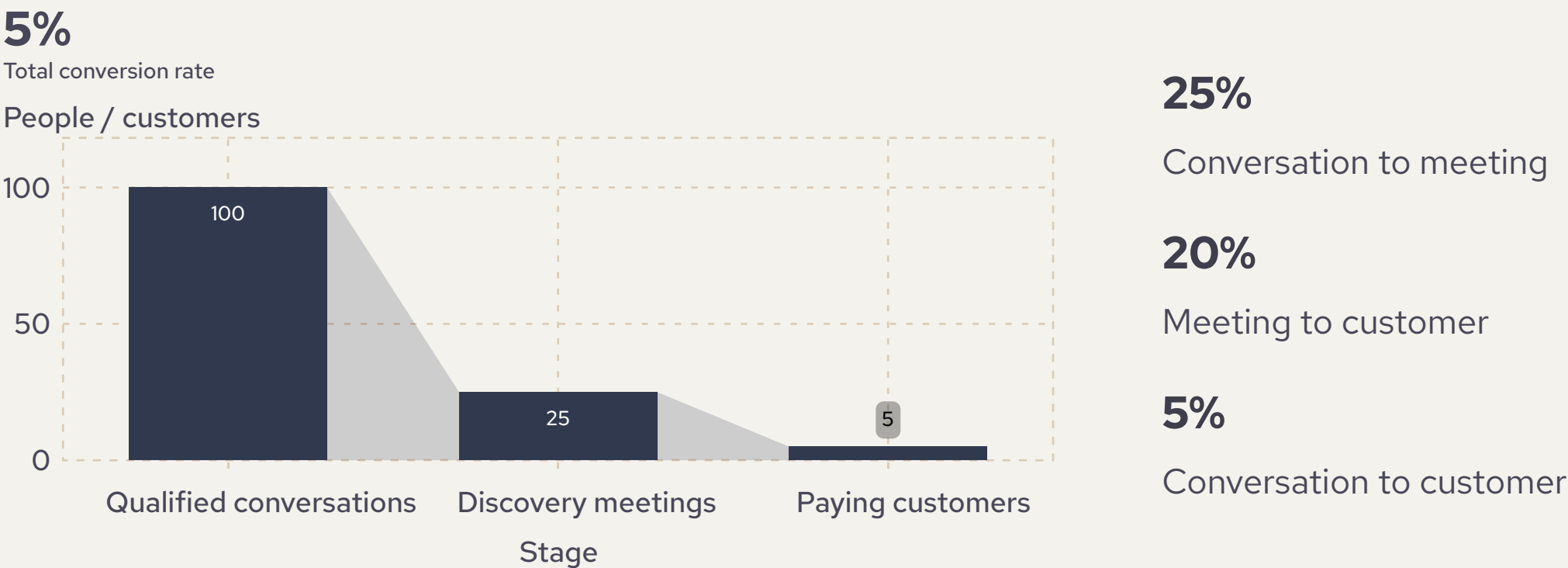
Use one customer segment, one offer, and one main destination. Set a capped budget, a measurement period, and a review decision before launch.

Test control	Agreed definition
Budget	_____
Qualified lead definition	_____
Maximum acceptable acquisition cost	_____
Measurement period / review owner	_____ / _____

No platform benchmarks. Keep ad spend separate from service fees.

The sales funnel calculation

◇ Illustrative example · Planning assumption



These are planning assumptions. Replace them with observed results.

Customer acquisition cost

$$\text{CAC} = \frac{\text{Attributable sales and marketing costs}}{\text{New paying customers}}$$

◇ Illustrative example

AED 600 per customer

AED 3,000 acquisition costs ÷ 5 new customers.

Actual costs: _____

New paying customers: _____

Actual CAC: _____

Included costs: _____

Excluded costs: _____

Unpriced founder selling time: _____

Match costs and customers to the same acquisition period. Count founder selling time separately if unpriced.

Contribution and acquisition payback

Monthly contribution per customer is service revenue minus direct customer-serving costs: generation usage, delivery labor, customer-specific software, and payment fees.

◇ Illustrative example

AED 2,000

Monthly service revenue

AED 800

Direct monthly costs

AED 1,200

Monthly contribution

$$\text{Simple payback} = \frac{\text{AED 600 CAC}}{\text{AED 1,200 monthly contribution}} = 0.5 \text{ months}$$

Before fixed overhead, tax, cash timing effects, and churn. Ad spend is separate from service fees.

Phase 3 weekly scorecard

Week ending: _____ Review owner: _____

Measure	Actual	Measure	Actual
Qualified conversations	_____	Meetings booked	_____
Meetings held	_____	Proposals sent	_____
New paying customers	_____	Acquisition spend	_____
Acquisition cost	_____	Main loss reason	_____
Next experiment	_____		

Which stage is currently limiting growth?

Review both counts and reasons. Do not expand a channel solely because it generates activity.



◇ Phase 4 · Delivery and retention

Make delivery reliable before adding sales volume

Clear scope → less confusion

Standard processes → fewer errors

Relevant reporting → better decisions

Consistent delivery → support for renewal

Retention does not follow automatically. Observe customer outcomes and renewal decisions.

The client onboarding checklist

Client: _____ First milestone: _____

Required confirmation	Owner	Required confirmation	Owner
☐ Package and scope	_____	☐ Payment status	_____
☐ Business details	_____	☐ Offer and service area	_____
☐ Brand assets	_____	☐ Required access	_____
☐ WhatsApp destination	_____	☐ Client approval contact	_____
☐ Measurement agreement	_____	☐ First milestone	_____

Check an item only when its confirmation is available. Assign a responsible owner to every open item.

The delivery workflow

◇ Proposed workflow · Confirm responsibility in the service scope

Sequence	Managed plan activity	Self-service customer activity
Inputs complete	Team checks completeness	Customer supplies inputs
Brief approved	Team prepares; client confirms	Customer confirms own brief
Draft creative prepared	Team uses AI assistance	Customer uses AI guidance
Quality review	Human owner checks quality	Customer checks output
Client approval	Team records approval	Customer approves use
Launch or handover	Team acts within scope	Customer executes
Performance review	Team reports agreed measures	Customer reviews results
Next iteration	Team proposes next change	Customer chooses next change

AI, human, and client responsibilities

◇ Proposed assignment · Replace roles with named owners

Activity	AI assistance	AI Agents 247 human owner	Client owner
Business brief	Structure inputs	Check scope and clarity	Confirm facts
Creative draft	Prepare options	Review and refine	Supply assets
Claims verification	Flag claims to check	Check supporting evidence	Substantiate claims
Creative approval	Summarize changes	Record decision	Approve
Campaign launch	Assist checks	Execute if in scope	Approve budget
Inquiry response	Assist agreed drafts	Confirm responsibility	Own sales response
Sales outcome tracking	Organize records	Separate sources	Report outcomes
Monthly review	Draft summary	Recommend changes	Confirm decisions

AI can assist with tasks. A named person owns the decision and customer outcome.

Quality control before launch

- ☐ Offer matches destination
- ☐ WhatsApp destination works
- ☐ Geography is correct
- ☐ Spend matches approval
- ☐ Creative is readable
- ☐ Claims have support
- ☐ Client has approved
- ☐ Required advertising permit footer is present
- ☐ Tracking method is agreed

Permit footer: [Insert verified permit wording and number]

Review owner: _____ Approval record: _____ Launch decision: _____

Customer outcome reporting

Client / period: _____ Record platform metrics, client outcomes, and unknowns separately.

Report field	Value	Source / verification status
Service fee	_____	_____
Advertising spend	_____	_____
Unique inquiries	_____	_____
Qualified inquiries	_____	_____
Cost per qualified inquiry	_____	_____
Appointments	_____	_____
Sales reported by client	_____	_____
Client gross profit, where available	_____	_____
Next change to test	_____	

Ad spend is separate from service fees. Unknown or unverified information stays labelled as such.

Retention and customer capacity

$$\text{Customer retention} = \frac{\text{Starting customers} - \text{Starting customers lost}}{\text{Starting customers}}$$

Net revenue retention also includes expansion and contraction from existing customers and excludes new-customer revenue.

◇ Capacity worksheet

Available delivery hours: _____

Average hours per customer: _____

Contingency allowance: _____

Estimated capacity: _____

◇ Illustrative example

20 customers

80 available hours ÷ 4 hours per customer, before contingency.

Use the same period for hours and customer workload. Reserve capacity for rework and exceptions.

Phase 4 bottleneck review

To validate: missing onboarding inputs, slow approvals, excessive revisions, or weak inquiry follow-up.

Bottleneck	Customer impact	Root cause	Owner	Process change	Evidence of improvement
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Which single process must improve before we accept more customers?

Choose one change and observe its effect before adding another.

◇ Phase 5 · Leadership and decision ownership

Reduce routine dependence on the founder

Preserve accountability while moving routine decisions closer to the work.

Proposed responsibilities: founder, delivery coordinator, campaign specialist, technical support resource.

These responsibilities do not necessarily require four full-time hires.



The ownership map

Assign one responsible owner, a backup, and an escalation condition for each activity.

Activity	Responsible owner	Backup	Escalation condition
Sales qualification	_____	_____	_____
Proposal approval	Founder	_____	_____
Onboarding	_____	_____	_____
Creative quality	_____	_____	_____
Campaign execution	_____	_____	_____
Customer communication	_____	_____	_____
Reporting	_____	_____	_____
Billing issues	_____	_____	_____
Technical incidents	_____	_____	_____

Proposed founder approval role to confirm. All other names remain blank.

Decision rights and spend approval

Routine work follows approved scope. New commitments need an authorized owner. Client ad budget changes need client approval. Material changes to promises need review.

◇ Proposed authority worksheet

Decision type	Who recommends	Who approves	Budget or scope limit	Required record
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Do not infer spending authority from task ownership. Record approval before making a new commitment.

Better escalations

1 Problem

2 Customer or commercial impact

3 Available options

4 Recommended option

5 Decision needed by

◇ Illustrative example

Creative approval is delayed; launch timing is at risk.

Options include following up with the approval contact, agreeing a revised launch date, or discussing a smaller approved scope.

Recommend the option that preserves approval and quality.
Ask for the decision by: _____

Check the agreed scope. Do not invent a contractual obligation or launch without approval.

The management rhythm

◇ Proposed cadence

Cadence	Owner	Inputs	Decision expected
Daily	_____	Blocked work; urgent customer issues	Unblock work; assign next update
Weekly	_____	Pipeline; cash; delivery; capacity	Choose priorities and resolve constraints
Monthly	_____	Contribution; retention; offer scope	Adjust economics and delivery scope
Quarterly	_____	Direction; resource needs	Choose direction and resource commitments

Small teams can combine reviews. Avoid unnecessary meetings.

Use existing records where possible. Every review should produce a decision or a clear next action.

◇ Phase 6 · Culture and long-term direction

Keep standards consistent as we grow

Maintain consistent behavior and customer standards as the business grows.

Clear promises

Customers know what is included and excluded.

Evidence-based decisions

Actual results remain separate from assumptions.

Ownership

Every issue has an owner and a next update.

Proposed values for the founder to refine.

Values in action

◇ Proposed behaviors · Refine and agree

Value	Expected behavior	Example of a violation	How we reinforce it
Clear promises	Explain exclusions before payment.	Imply extra work is included.	_____
Evidence	Separate actual outcomes from assumptions.	Present an unverified outcome as fact.	_____
Ownership	Name an owner and next update for an issue.	Pass an issue on without follow-through.	_____
_____	_____	_____	_____

Use these standards in onboarding, quality review, and feedback. Agree reinforcement rather than assuming compliance.

The future business narrative

◇ Proposed direction · Fill in the operating ambition

"In three years, AI Agents 247 serves _____. Our core offer is _____. Customers value us because _____. Our monthly recurring revenue target is _____. Our delivery model works because _____. The founder focuses on _____."

What must be true operationally before this vision is credible?

Financial goals are targets, not forecasts or guarantees.

The phased implementation plan

Phase	First action	Owner	Completion evidence	Dependency
Founder capacity	_____	_____	Time audit and one completed transfer	_____
Customer and offer	_____	_____	Confirmed segment, offer, and scope	_____
Acquisition	_____	_____	Recorded acquisition test	_____
Delivery and retention	_____	_____	Documented delivery pilot	_____
Leadership	_____	_____	Ownership map and review rhythm	_____
Culture and direction	_____	_____	Agreed values and direction	_____

Workshop decisions can happen quickly. Customer evidence, retention, and repeatability require observation over time.

Our Next Decisions

- One customer segment
- One core offer
- One acquisition experiment
- One delivery process to improve
- One recurring founder task to transfer

Decision field	Agreed record
Priority	_____
Owner	_____
Completion evidence	_____
Next review	_____

“Growth becomes manageable when promises, numbers, and responsibilities are clear.”

Inspired by the six-phase structure of Dan Martell's Scale Your Business Workbook supplied by the founder. AI Agents 247 examples and exercises use original wording. No affiliation or endorsement is implied.