



YOUR AI-POWERED BUSINESS ENGINE

The dAIsy **Automation** Recipe Book

5 workflows to set up first. Each one is a complete recipe you can build in under 30 minutes — ranked by impact.

01 — New Lead Welcome Sequence

The most important automation you will ever build

🕒 20 minutes to build

🔄 Runs forever

WHY THIS MATTERS

Responds to every new lead within 30 seconds. Businesses that respond within 5 minutes are 9x more likely to convert.

Timing	Channel	What Happens
Immediately	SMS	Hi {{contact.first_name}}, thanks for getting in touch with [Business]! I'll be with you shortly. In the meantime, feel free to grab a time: [booking link]
5 minutes	Email	Subject: Your enquiry to [Business]. Body: personal, brief intro, one key benefit, booking link CTA.
24 hours	Condition	IF appointment booked → end. IF NOT → continue to Step 4.
24 hours	SMS	Hi {{contact.first_name}} — just checking my message got through! Happy to answer any questions. [booking link]
3 days	Email	Value content: tip, insight, or short case study. No hard sell. End with: "Happy to chat if this resonates."
7 days	SMS	Final soft close: "Don't want to pester you! If [service] is still on your radar, I'd love to help: [link]. If not, no worries at all."
Day 7 + 1hr	Internal Task	Review this lead manually. If they've engaged but not booked, a personal call may convert them.

Pro tips: Tag the contact 'New-Lead' when they enter and remove it when they book. This prevents the sequence firing for existing clients. Add the contact to your pipeline at 'New Enquiry' stage automatically using a workflow action.

02 — Missed Call Text Back

Recover every missed call automatically

🕒 2 minutes to set up

WHY THIS MATTERS

60–80% of callers who don't get an answer call a competitor next. This stops that from happening.

HOW TO SET IT UP

Settings → Missed Call Text Back → ON

Customise message: "Hi, it's [Your Name] from [Business] — sorry I missed you! I'm with a client right now. Reply here and I'll get straight back, or book a time: [booking link]"

Test it: Call your dAIsy number from another phone and let it ring out. The text should arrive within 30 seconds.

Pro tips: Use your dAIsy number as your main business number so this fires on every missed call, not just calls to one line. The message should sound like you wrote it — not an automated reply. First person, casual, helpful.

03 — Appointment Reminder Sequence

Cut your no-show rate by up to 60%

🕒 5 minutes to set up

WHY THIS MATTERS

No-shows cost you time and money. Automated reminders at 24hrs and 1hr before reduce them dramatically.

HOW TO SET IT UP — APPOINTMENT REMINDERS

Calendars → Your Calendar → Edit → Notifications

24 hours before — SMS + Email: "Hi {{contact.first_name}}, looking forward to seeing you tomorrow at [TIME]. [Address or call link]. Any questions, just reply! — [Your Name]"

1 hour before — SMS: "Hi {{contact.first_name}} — see you in an hour! [Address or call link]"

If cancelled — Internal notification: Sends you an alert immediately so you can reach out and reschedule before the slot is lost

Pro tips: Include the appointment location or call link in every reminder. Removing friction at the last minute prevents cancellations. For video calls, include the Zoom/Teams link directly in the reminder SMS.

04 — Review Request Automation

Build your reputation on autopilot

🕒 10 minutes to build

WHY THIS MATTERS

Businesses with 50+ Google reviews win the click over businesses with 8. This automation requests a review at the perfect moment after every job.

Timing	Channel	What Happens
Trigger		Pipeline Stage moved to Won
Wait 2 hours	Delay	Gives the client time to get home and settle before the request arrives
Send	SMS	Hi {{contact.first_name}}, thanks so much for choosing [Business] — it was a pleasure! If you have 2 minutes, we'd really appreciate a Google review: [YOUR GOOGLE REVIEW LINK]

Timing	Channel	What Happens
Wait 3 days	Condition	IF review left (tag: Review-Left) → end. IF NOT → send email follow-up
Send	Email Follow-up	Subject: One small favour... Body: Similar to the SMS but slightly longer. Include the review link again. This is the last request — don't send more.

Pro tips: Your Google review link: search your business name on Google, click 'Write a Review', and copy the URL. This is the link to use. Aim to get to 50 reviews as fast as possible — this is the threshold where Google starts prominently featuring your business in local search.

05 — Cold Lead Re-engagement Sequence

Wake up your dormant database

 25 minutes to build

WHY THIS MATTERS

Most businesses have a database full of people who enquired but never converted. This sequence re-engages them over 18 days without you lifting a finger.

Timing	Channel	What Happens
Day 1	Email	Subject: It's been a while, {{contact.first_name}}... Body: Warm, personal re-introduction. What's new at your business. One question: "Is [service] still something you're thinking about?" No hard CTA.
Day 4	Email	Subject: [Useful tip for their industry]. Body: Pure value. A tip, insight, or short piece of content relevant to their situation. No ask at all.
Day 11	Email	Subject: What we did for [similar business]. Body: Short case study or result. Specific numbers if you have them. Soft CTA: "Could we do something similar for you?" + booking link.
Day 18	SMS	Hi {{contact.first_name}} — [Your Name] from [Business]. Just wanted to reach out one last time. If [service] is on your radar, I'd love to chat: [booking link]. No pressure at all.
Day 19	Action	Remove 'cold-lead' tag. Add 'Nurture-Complete' tag. These contacts can be added to a long-term newsletter list.

Pro tips: Tag contacts as 'cold-lead' in bulk: [Contacts → filter by Last Activity](#) → select all with no engagement in 30+ days → bulk add tag. The sequence starts automatically. The Day 4 value email is the most important. If someone re-engages at any point, branch the workflow to remove them from the cold sequence and add them back to your active follow-up.

Build Them in Order

By the time you've built all five recipes, your business is following up leads, confirming appointments, chasing reviews, and re-engaging cold contacts — automatically, 24 hours a day.