



# Speed SOS

Module 3  
Planning...



# What to Automate...

1. What consumes mental energy... something you just hate!
2. Things you avoid. I've wanted to build a 2nd brain for some time from all of the consulting calls I've done over the last 10 years (we'll look into this next week or week after)
  - a. Required vimeo transcripts
  - b. Getting over a thousand transcripts manually = no progress
  - c. Built an automation :)
  - d. We'll go through in detail soon.
  - e. Plus you have access to import into your account.
  - f. Let's review: <https://lhmagic.app.n8n.cloud/workflow/zmTN3toeLq5Po6B3>



# When to Automate...

1. Really depends on your personal situation...
  - a. Use annoyance and cost (financial and mental)
  - b. In my case, it was need to reduce accounting data entry cost.
  - c. We were spending ~US\$30k per year.
  - d. Goal: Stop wasting money on data entry.
  - e. Focus: Cash Flow planning, better understanding of CAC with cohort analysis, where are we leaking value (for those who did Finance SOS, the 8 metrics of valuation), tax planning esp. Depreciation rules.
    - i. These things move a lot of value, are NEVER urgent but bite you in the a\$\$ at exit.
  - f. So it was non-AI automation
  - g. We were using AI but 'manually'.
  - h. You'll soon see how to use AI as an agent.



## When to Automate (2)

1. This is a lot more formal.
  - a. I'm not convinced it results in a better outcome.
  - b. But it does help you sell it internally or if you want to do this for clients.
2. Grid
  - a. Business Process Map whole business
  - b. List it in a table.
  - c. Current Cost, Time and Resources consumed.
  - d. Look at level of cost reduction or gain
  - e. Return on Investment Calc.
  - f. Probability of success (optional)
  - g. Adjusted Return on Investment
3. If you are going to provide this as a service, then presenting this type of a table/spreadsheet helps get deal over the line. Changes the conversation.