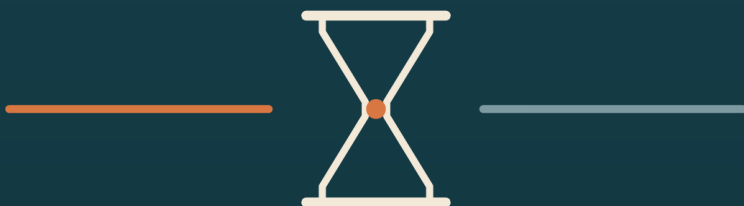


AI AUTOMATION
FOR SMALL BUSINESS

THE OWNER BOTTLENECK

Finding the hours your business eats,
and automating the first one



AI AUTOMATION FOR SMALL BUSINESS

The Owner Bottleneck

Finding the hours your business eats, and automating the first one

BOOK ONE

Workbench Press

The Owner Bottleneck

Finding the hours your business eats, and automating the first one

Book One of *AI Automation for Small Business*

Edition 1.0, 2026. Published by Workbench Press.

Copyright © 2026 Workbench Press. All rights reserved.

No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in reviews and certain other non-commercial uses permitted by copyright law.

Single-user licence. This copy is licensed to one reader for use within one business. You may print it for your own use and adapt the accompanying templates for your own operations. You may not resell, redistribute, share, or republish this book or its templates, in whole or in part, or use them to deliver paid training or consulting to third parties.

All persons and companies in this book are fictional. Northline Mechanical Ltd., Harbour & Finch, and every individual, customer and figure attributed to them are invented for the purpose of illustration. Any resemblance to real businesses or people is coincidental. No figure in this book is a measurement of a real company or evidence of any result.

No professional advice. This book is general information about designing business workflows. It is not legal, tax, accounting, financial or regulatory advice. Tax treatment, licensing, permitting, consent and marketing requirements vary by jurisdiction and change over time. Obtain advice qualified for your own situation before acting. No figure in this book includes sales tax; all amounts are pre-tax subtotals.

No income claim. Nothing in this book promises, projects or guarantees any financial outcome. Illustrative calculations are labelled as such and rest on stated assumptions that may not hold for your business.

Software. Third-party product names are the trademarks of their respective owners and are referenced descriptively. Pricing, features and interfaces change; verify current terms before relying on them.

Workbench Press · workbenchpress.com

Contents

- Quick start: the Friday Audit 9
- Chapter 1 · The Tuesday That Cost \$1,574 14**
- Chapter 2 · Not All Hours Are Equal 29**
- Chapter 3 · What a Machine Can Actually Do For You 42**
- Chapter 4 · Designing Your First Workflow 56**
- Chapter 5 · Proving It Worked 79**
- Capstone: The Prioritized Automation Plan 91
- Measurement and scaling 94
- Troubleshooting index 96
- Glossary 97
- Resource index 99
- Source notes 100
- Appendix A — A complete week at Northline 101
- Appendix B — Your first ninety days 105

Front matter

What this book promises

By the last page you will have two things.

The first is a written, ranked list of every repetitive task in your business, scored so that the top of the list is genuinely the thing to fix first — not the thing that annoys you most, which is rarely the same thing.

The second is a complete, written specification for your first workflow — the categories, the field mappings, the prompt, the failure handling, the stop conditions and the test plan. Not a sketch. A document precise enough that you, or someone you hire, could build it without making a single design decision along the way.

This book stops at the specification, deliberately. Book 2 builds one. The reason for the split is in Chapter 4, and it comes down to this: nearly every workflow that fails, fails in its design rather than its assembly — and a design is something you can get right on paper, for nothing, before you have spent a dollar or signed up for anything.

Who this is for

You own or run a small business. You have somewhere between zero and about twenty staff. You are the person who notices when something falls through a crack, usually because it lands on you.

You do not write code. Nothing in this book requires it. You will do some careful clicking, some careful thinking about where information should go, and some testing. If you have ever built a spreadsheet with a formula in it, you have already done something harder than most of what follows.

Who this is not for

If you are looking for a list of prompts to paste into a chat window, this is the wrong book, and you should not buy the other four either. Prompts are a component here, the way a spark plug is a component of a car. This book is about the car.

If you want to become an AI consultant and sell this to other people, that is a different product and this is not it.

What you need before you start

Requirement	Detail	Cost
A spreadsheet program	Anything that opens .xlsx. You almost certainly have one.	Free
A word processor	For the canvas and the plan	Free
One week, before you analyse anything	For the Friday Audit. This is not optional.	Your attention
About 5–7 hours of desk work	The audit, the scorecard and the workflow canvas, spread across two to three weeks. Building what you design is separate, and Chapter 2 is blunt about how long that takes	Your time

No subscriptions. No card. A free chat-assistant account is the only sign-up anywhere in this book, and only if you want to try a prompt yourself. This book costs you nothing to work through beyond the time. Chapter 4 designs a workflow; it does not ask you to sign up for anything to do so. Where the book mentions what software *will* cost when you eventually build — in Chapter 4's closing section — it gives ranges and tells you to verify them, because pricing changes and a printed figure goes stale.

What this book will not do

It will not decide anything consequential on your behalf. Every workflow in this book stops and shows you its work before anything reaches a customer.

It will not make claims about how much money you will save. It will show you how to measure what actually changed, which is a different and more useful thing. Chapter 5 is largely about why saved time is not the same as earned money, and what has to be true before one becomes the other.

It will not replace your judgment about your own business. You will be told several times where a formula is more reliable than an AI model, and where a human is more reliable than either.

Where this book applies

Everywhere. The examples are set in a specific place because a story needs one — Northline Mechanical is in Burnaby, British Columbia. Nothing in the method depends on that. An electrician in Manchester or a bookkeeper in Austin will follow it unchanged.

Two things are deliberately left to you. **No figure in this book includes sales tax** — taxability of services varies by country, state and province, so every number here is a pre-tax subtotal. And **licensing, permits and regulated scope vary**: where the examples treat something as outside scope, read that as an illustration of having such a boundary, not as a statement about your trade in your region.

Currency is plain dollars throughout and is illustrative. Read it as whatever you charge in.

A note on the examples

Every example in this book, and in the four books that follow it, concerns a company called Northline Mechanical Ltd.

Northline is fictional. Dana Okonkwo, Marcus, the three technicians, the customers, and every number attached to them are invented for this book. They are consistent — the arithmetic holds, and the same figures appear in all five books — but they are not measurements of a real business, and nothing in them should be read as evidence of what automation will do for yours.

They are here because an example you can follow across four hundred pages teaches more than forty examples you meet once.

How to read this

Do the Friday Audit first, before Chapter 1. It takes five minutes a day for five days and it produces the raw material the whole book works on. If you skip it, Chapters 2 and 3 will be an interesting read and nothing more.

Then read straight through. The chapters build.

Quick start: the Friday Audit

Time: five minutes a day, Monday to Friday. Plus twenty minutes on Friday afternoon.

You cannot fix a bottleneck you have not found, and almost nobody can find theirs from memory. Owners consistently misremember where their week goes — not because they are careless, but because the tasks that eat the most time are the ones that feel like nothing while you are doing them. Four minutes here, six minutes there, forty times a week.

So we measure first.

What you are going to do

Keep a log. Not of everything — only of the administrative work. Not the work you sell. If you are an electrician, wiring a panel is not admin. Writing the quote for the panel is.

The tracker

Open the file `01_time_tracker.xlsx` from your toolkit. It has nine columns:

Column	What goes in it	Example
Date		Tue 10 Mar
Start time	Round to five minutes	8:15
Minutes	Round to five minutes	25
Task	Short, plain description	Wrote quote for Kowalczyk furnace
Category	Pick from the list on the second sheet	Quoting
Trigger	What caused this to happen now?	Web form came in Sunday
Inputs	What did you need in front of you?	Price list, site photos, last year's invoice
Decisions	What did you actually decide?	Which unit to spec; discount level
Felt like	Fine / Tedious / Stressful	Tedious

Two of those columns are doing quiet, important work.

Trigger matters because a task with a clear, repeatable trigger — an email arrives, a form is submitted, it becomes Monday — can be automated. A task that happens because you happened to think of it cannot, at least not yet.

Decisions matters because it is the honest test of whether a machine can help. A task where you decided nothing is a strong candidate. A task where you decided one thing from a fixed list is a good candidate. A task where you weighed six factors and used twenty years of judgment is not a candidate, and Chapter 3 will tell you to leave it alone.

Rules

1. **Log it within the hour, or don't log it.** Reconstructing your Tuesday on Friday produces fiction.
2. **Round generously.** Five-minute precision is plenty. Chasing accuracy makes people quit on day two.
3. **Log the interruptions too.** The four-minute phone call that broke your concentration goes in. Those add up, and they are often the real story.
4. **Do not change your behaviour.** The temptation is to have a tidy week. A tidy week teaches you nothing.

Friday afternoon: twenty minutes

Sort the log by Category and total the minutes. Then answer three questions in writing, at the bottom of the sheet:

1. Which category took the most time?
2. Which category had the most separate entries? (Not the same answer, usually. This is the one that fragments your day.)
3. Which single entry, if it had gone wrong, would have cost you the most money?

Those three answers are the seed of everything in this book. Keep them.

What Dana's week looked like

Dana Okonkwo runs Northline Mechanical, a heating and cooling company in Burnaby, British Columbia. Three technicians, three vans, one office coordinator named Marcus, and Dana. Around \$1.37 million a year, from about 62 completed jobs a month at an average invoice of \$1,840.

She did the Friday Audit in the second week of March. Here is what came back.

Northline Mechanical — administrative hours, week of 9 March (illustrative)

Category	Hours	Separate entries
Writing and revising quotes	4.0	9
Returning and triaging inbound calls	3.5	31
Scheduling and rescheduling technicians	2.5	18
Invoicing and chasing payment	2.0	14
Reading and sorting email	1.5	22
Supplier orders and price checks	1.5	7
Chasing unsigned quotes	1.5	11
Warranty and callback correspondence	1.5	6
Payroll prep and timesheet fixes	1.0	3
Total	19.0	121

Nineteen hours. Dana's whole week was 58 hours, so roughly a third of her working life was administration. She had guessed, before the audit, that it was "maybe ten hours, twelve on a bad week."

Look at the second column, though, because that is where the surprise is.

Quoting took the most hours — four — across nine sittings. Call triage took less time in total, three and a half hours, but it happened **thirty-one separate times**. Thirty-one interruptions in a week. Each one cost Dana more than the minutes it consumed, because each one landed in the middle of something else.

This is the pattern that the two columns were designed to catch, and it is why the ranking in Chapter 2 does not simply sort by total hours. The biggest number is not always the biggest problem.

Before you turn the page

You should now have: five days of log entries, three written answers, and a total. If you don't, the next chapter will still make sense, but you'll be reading about Dana's business instead of working on your own.

CHAPTER 1

The Tuesday That Cost \$1,574

A written cost estimate for your single worst bottleneck, built from figures you can defend, plus a clear understanding of which of those figures are real and which are assumptions.

The problem this chapter is about

Bottlenecks are expensive in a way that is almost invisible on a profit and loss statement. This chapter makes one visible, in dollars, using arithmetic you can repeat on your own numbers.

What you will have at the end: a written cost estimate for your single worst bottleneck, built from figures you can defend, plus a clear understanding of which of those figures are real and which are assumptions.

What this chapter will not do: tell you that fixing the bottleneck recovers that money. It usually does not, or not all of it. Chapter 5 deals with that honestly. Right now we are sizing the problem, not promising a return.

Priya

On the second Tuesday in March, at 8:12 in the morning, a woman named Priya Raghunathan filled in the contact form on Northline's website.

Her furnace had failed overnight. The form had four fields — name, phone, email, and a box marked *How can we help?* — and into the last one she typed: *Furnace not firing, house is 11 degrees, two small kids, please call ASAP.*

The form sent an email to `info@northlinemechanical.ca`.

Dana read it at 5:40 that afternoon.

She had been on a roof in Coquitlam most of the day. Her phone had the email, in the sense that the email was technically on the phone,

sitting eleventh in an inbox that had collected thirty-one items since morning, between a supplier newsletter and a notification about a software update.

At 5:41 she called. Priya had booked someone else at 10:30 that morning. They had arrived at 2:00 and replaced an ignition control module.

What it cost

Here is the arithmetic. Every figure is from Northline's own records — which means, in this book, that it is illustrative. When you do this for your business, these will be your real numbers.

Item	Value	Where it comes from
Average invoice, emergency furnace repair	\$1,840	Northline's 12-month average
Gross margin on that work	46%	Northline's job costing
Contribution lost on this one job	\$846	$\$1,840 \times 0.46$

So the immediate cost of the nine hours was \$846 — not \$1,840, because the \$1,840 includes parts Northline did not have to buy and technician hours it did not have to pay for. This distinction matters. An owner who counts the full invoice as "lost revenue" will overstate the problem by more than double, and overstating a problem is how you end up buying software you didn't need.

Now the part that hurts more.

Priya's furnace was fifteen years old. The ignition module bought her a season, maybe two. The company that showed up at 2:00 that Tuesday is the company she will call when it dies for good, and the

one she will ask about a replacement, and the one her name will attach to when a neighbour asks who to use.

Northline's own figures on a new residential customer (illustrative):

Item	Value
First-job contribution	\$846
Probability of a second job within 24 months	0.38
Average second-job contribution	\$1,180
Probability of converting to a maintenance contract	0.22
Maintenance contract contribution, per year	\$310
Average contract life	4.1 years

Working it through:

- Second job: $0.38 \times \$1,180 = \textbf{\$448}$
- Maintenance: $0.22 \times \$310 \times 4.1 = \textbf{\$280}$
- First job: **\$846**
- **Expected contribution from one new customer: \$1,574**

\$1,574. That is what one missed inquiry costs Northline on average, and it is roughly double what the single job was worth. It is also the number in this chapter's title, and the reason the title is not \$846: the cost of the nine hours was never the repair. It was the customer.

The figure is carried at full precision — \$1,574.42 — everywhere it is used in this book and the four that follow, because rounding it to \$1,600 and then multiplying by a year's worth of inquiries introduces an error of several thousand dollars in the annual figures. Round at the end, never in the middle.

A note on that 46%

Northline's gross margin on emergency repair work is 46%. That number does a lot of work in this chapter, so it's worth defending.

An industry benchmark published by ServiceTitan, a field-service software vendor, suggests HVAC businesses should target an average gross profit margin of **50–55% across their services**, with residential service and replacement operations typically running 30–45% overhead and 10–20% net margin (ServiceTitan, accessed 2026).

Two things follow.

Northline's 46% is deliberately below that target. It is a plausible figure for a small three-van operation without the purchasing power or route density of a larger firm — and choosing the conservative end means every loss figure in this chapter is understated rather than inflated. When you are building a case, understate. An argument that survives a hostile reading is worth more than one that collapses under it.

That benchmark is a vendor's target, not independent research. ServiceTitan sells software to HVAC companies; a benchmark published by a vendor is a useful reference point and not a neutral one. It is cited here because it is free to read and transparent about what it is. Treat it accordingly.

This is the standard applied to every external figure in these five books: free to access, attributed to its actual publisher, and labelled when the publisher has an interest. Where a figure could not be verified from a free source — and several could not — it does not appear at all, however convenient it would have been.

Use your own margin, not this one. Three recent jobs, minus materials and direct labour, averaged. It takes twenty minutes and it is the single most important number in your Chapter 1 calculation.

If you don't know your margin

Most small business owners don't, precisely. They know roughly what they charge and roughly what things cost, and the gap between those feels like the margin. It usually isn't, and the error runs in one direction: people overestimate.

Here is the twenty-minute version. You need three recent jobs of the kind you're analyzing.

For each job, write down what you invoiced. The number the customer paid, before tax.

Subtract the materials that went into it. Actual parts, at what you paid, not what you charged. Include the ones you had in the van — those were bought at some point.

Subtract the direct labour. The technician's hours on that job at their real hourly cost, which is not their wage. Add roughly 15–25% for payroll taxes, benefits, and paid time off, depending on what you offer. If you pay \$32/hour, your real cost is closer to \$38.

Subtract the direct costs people forget. Travel time to and from the site. Fuel. The cost of the return visit if there was one. Warranty callbacks on that job type, averaged.

What's left is contribution. Divide by the invoice, and that's your contribution margin.

Worked example, one of Northline's jobs:

Line	Amount
Invoiced	\$1,840
Parts at cost	(\$612)
Technician, 4.5 hrs at \$38 loaded	(\$171)
Travel, 1.2 hrs at \$38 + fuel	(\$62)
Warranty reserve, 3% of invoice	(\$55)
Contribution	\$940
Margin	51%

That job ran at 51%. Averaged across three, Northline lands at 46%, because the other two involved more parts and a second visit.

What you have not subtracted, deliberately: rent, insurance, your own salary, the phone bill, the accountant, the van payments. Those are overhead. They exist whether or not you do this job, which is exactly why they're excluded from a calculation about *one more job*.

This is the distinction that makes the whole chapter work. The question "what did I lose by missing Priya?" is a question about one marginal job, and the right answer uses contribution. Using net profit after overhead would understate it; using revenue would overstate it by more than double.

If your three jobs disagree wildly — one at 60% and one at 25% — that is a finding, not a problem with the method. It usually means you have two different kinds of work wearing the same name, and you should split them and calculate separately. Plenty of businesses discover here that one of their service lines barely contributes at all.

From one to the pattern

One missed inquiry is a bad Tuesday. The question is how often it happens.

Northline receives 118 inquiries a month: 61 by phone, 34 through the web form, 23 by email. The phone calls mostly get answered, because a ringing phone is hard to ignore. The 57 that arrive as text – form and email – are the problem, because they sit.

Dana pulled her median first-response time for web form inquiries across the previous quarter. It was **9 hours 24 minutes**.

She could not directly measure how many she lost to slowness. Nobody can – the customers who go elsewhere do not send a note explaining why. So she did the only honest thing available, which is to build a range and label it as an assumption.

Assumption, not measurement: of the 57 text-based inquiries per month, between 4% and 9% are lost to slow response. The low end assumes most customers wait; the high end assumes urgent jobs mostly don't.

Scenario	Lost inquiries/month	× \$1,574.42	Annual
Low (4%)	2.28	\$3,590	\$43,076
High (9%)	5.13	\$8,077	\$96,921

(These use the exact expected value of \$1,574.42. If you use the rounded \$1,600 instead, you get \$43,776 to \$98,496 – the conclusion is identical, which is a good sign that the estimate isn't sensitive to rounding. The toolkit spreadsheet uses the exact figure.)

Between forty-three and ninety-seven thousand dollars a year, on a \$1.37 million business. Somewhere between 3% and 7% of revenue, disappearing into an inbox.

Be careful with this number. It is a modelled estimate resting on one assumed range, and Dana cannot prove it. What she *can* prove is the 9-hour-24-minute median, which is a measurement. The honest way to hold both is: *the delay is real and measured; its cost is estimated within a wide band, and the band is wide because the underlying loss rate is unknown.*

That is a weaker claim than "we're losing \$98,000 a year." It is also one that survives contact with a skeptical business partner, which the stronger claim is not.

Why Dana couldn't just ask

The obvious way to find out how many customers you lose to slow response is to ask them.

Dana tried. For three weeks she called every inquiry that hadn't converted and asked why. She got seventeen conversations out of forty-one attempts, and here is what they told her:

- Eleven said they'd "gone with someone else" and offered no reason
- Four said price, though only one had received a quote from Northline
- Two said they'd decided to wait

Not one person said "*you took too long to call me back.*"

This is not because the delay didn't matter. It's because people don't experience it that way. A customer whose furnace is dead calls three companies, books whoever answers first, and forgets the other two existed. By the time Dana phoned, Priya wasn't harbouring a grievance about response time — she'd simply solved her problem and moved on.

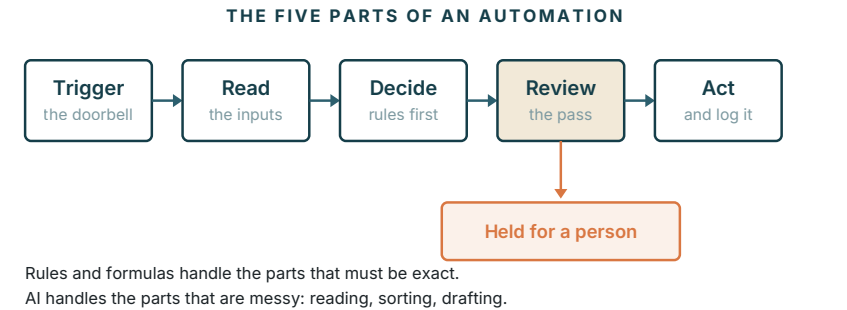
The lesson generalizes, and it's worth holding onto for the rest of this book:

The failures that cost you most are the ones that generate no complaint. A customer who is angry tells you. A customer who quietly went elsewhere is invisible, and the size of that group cannot be recovered by asking.

This is exactly why Chapter 5 spends its time on process metrics. Dana can measure her response time to the minute. She cannot measure what it cost her, and no amount of diligence will change that. Build the case on what you can observe, and be honest about the rest.

Why the bottleneck is the only thing worth fixing

Northline spends about \$1,400 a month on Google Ads. Those ads work — they are a large part of why 118 inquiries arrive.



A PROMPT IS ONLY THE THIRD BOX. THE OTHER FOUR ARE THE SYSTEM.

Figure 1.1 — What you are going to build, in outline. Chapters 2 to 5 fill in one box at a time.

Here is what happens if Dana doubles that spend to \$2,800 and the ads perform as well as before: roughly 118 more inquiries, of which about 57 arrive as text, of which between 4% and 9% are lost to a response time that has not changed at all. She has bought herself more of the same leak.

Think of a funnel with a narrow neck. Pour in twice as much and twice as much backs up at the neck. Nothing that happens above the neck changes what comes out the bottom. The only intervention that changes the output is widening the neck.

This is the single most useful idea in this book and the reason it comes first. Most small businesses under-invest in the narrow part of their process and over-invest above it, because the part above it is more visible, more fun, and easier to buy.

Before spending another dollar on getting more inquiries, Dana needs to answer the ones she already has.

Where AI is the wrong tool here

Worth saying plainly, since this is Book One of a series about AI.

Nothing in Priya's story required intelligence. It required *noticing*. An email arrived and nobody looked at it for nine hours. The fix for that is not a clever model; it is a rule — *when a form is submitted, do something immediately* — which is ordinary automation and has been possible for twenty years.

What AI adds, and you will build this in Chapter 4, is the ability to read the free-text box and understand that "house is 11 degrees, two small kids" is more urgent than "thinking about maybe upgrading my thermostat sometime this spring." A rule cannot do that without a keyword list that breaks the first time someone phrases it differently.

So the honest division of labour, which holds throughout all five books:

Job	Best tool	Why
Notice that a form arrived	Rule	Deterministic, instant, never wrong
Understand what the text means	AI	Handles phrasing a keyword list cannot
Decide the priority tier	AI, proposing	Judgment, but reviewable
Calculate the quote total	Formula	Must be exactly right, every time
Decide whether to discount	Human	Commercial judgment with consequences
Send anything to the customer	Human approval	Consequential and irreversible

Notice that the AI is doing one job in the middle of that list, and that a human sits at the end of it. That shape recurs in every workflow in this series.

Build it with me: sizing your own bottleneck

Open `02_bottleneck_cost.xlsx`. It has the same structure as Dana's arithmetic, with the formulas already in place.

Step 1 — Pick one bottleneck. Use your Friday Audit. Take the category with the most separate entries, not the most hours. Fragmentation is usually the more expensive problem and almost always the easier one to fix first.

Step 2 — Find your unit of loss. What is the thing that gets lost when this task goes badly? A customer. An invoice. A day of schedule. Name it.

Step 3 — Value one unit. This is the step people rush. You need contribution, not revenue: what is left after the direct costs of delivering that unit. If you don't know your gross margin, take three recent jobs, subtract materials and direct labour, and average them. An approximate margin you calculated beats a precise revenue figure that overstates the case.

Step 4 — Add the tail, if there is one. Repeat business, referrals, contracts. Use your own probabilities. If you genuinely don't know them, leave them out and note that your figure is therefore conservative. An understated number you can defend is worth more than an inflated one you cannot.

Step 5 — Estimate frequency as a range. Low and high. If you find yourself wanting a single number, that is the instinct to resist. You do not know it. The range is the honest answer.

Step 6 — Write one paragraph. Separate what you measured from what you assumed. It should read something like:

We receive about [N] of these per month. Our median response time is [X], which we measured from [source]. We estimate we lose between [low]% and [high]% of them — a stated assumption, with the range chosen deliberately wide. At [\$Y] contribution per unit, that is between [\$A] and [\$B] per year.

If you can't write that paragraph, you don't yet have the numbers, and Chapter 2 will be guesswork.

Acceptance criteria

You are done with this chapter when:

- ☐ Every figure is traceable to a record, a calculation, or an explicitly labelled assumption
- ☐ You have used contribution, not revenue
- ☐ Your frequency estimate is a range, not a point
- ☐ Your paragraph distinguishes measured from assumed
- ☐ Someone who disagrees with you could point at exactly which number they dispute

That last one is the real test. A cost estimate nobody can argue with is usually one nobody can check.

When it goes wrong

"My number came out enormous and I don't believe it." Good instinct. Check three things. Are you using revenue instead of contribution — the most common error, and it roughly doubles everything. Are you counting the same loss twice, once as a lost job and again as a lost customer? Is your high-end frequency assumption defensible, or did you pick it because it felt dramatic? Halve it and see whether the case still holds. If it does, you have something.

"My number came out tiny." Then this is not your bottleneck, and that is a genuinely useful finding. Go back to the audit and take the next category. You may also have picked something that is annoying rather than expensive — a real distinction, and worth knowing which you are dealing with before you spend a weekend on it.

"I don't have the data." Most owners don't, at first. Start measuring one thing this week: timestamp in, timestamp out, for your chosen bottleneck. Two weeks of real data beats a year of estimates. Come back to this chapter then.

Maintenance

Redo this calculation every six months, or whenever volume changes by more than about a quarter. A bottleneck that was worth \$44,000 at 118 inquiries a month is worth considerably more at 180, and the ranking in Chapter 2 can genuinely reorder as a business grows.

Your turn

Before Chapter 2, produce one page: your bottleneck, your unit of loss, your contribution per unit, your frequency range, your annual figure, and your paragraph separating measurement from assumption.

Chapter 2 ranks it against everything else in your audit — because the most expensive problem and the one you should fix first are, frustratingly often, not the same one.

Chapters 2 and 3. Approximately 23 pages.

END OF SAMPLE

That was Chapter One.

You now have the Friday Audit and a written cost estimate for your single worst bottleneck. That is a real piece of work, and it is yours whether or not you ever buy anything.

If the arithmetic in that chapter matched something you recognise in your own week, the rest of the series does the same thing four more times — each book taking one part of the business and building a controlled, stoppable workflow end to end.

WHAT THE FULL BUNDLE CONTAINS

Book One — The Owner Bottleneck

106 pages. Scoring every task on four dimensions, and automating the first one properly.

Book Two — The Gap Between Hello and Yes

94 pages. Intake, a six-sheet price book with a live quote builder, and follow-up that does not run on your memory.

Book Three — Escape Velocity

81 pages. Customer service that answers itself and knows when to stop. Grounded replies that cite their source, and a test set of hostile inputs.

Book Four — The Business That Remembers

75 pages. Decisions extracted from notes, duplicates prevented on the way in, and a log that outlives whoever wrote it.

Book Five — The Machine Room

72 pages. Wiring the four together. Handoffs, owners, a failure runbook, and a cost model that separates saved hours from saved money.

The Ground Floor

27 pages. The shared primer — what a model can and cannot reliably do.

Build Notes

31 pages. The platform supplement, which wires the workflows on tools that are free with an ordinary personal account.

40 working files

Audit spreadsheets with the formulas already in them, workflow specifications, templates, a knowledge base, cost and capacity models, and two test sets.

No coding. No paid software required for the main path. One reader, one business. You receive everything as a single download the moment you pay.

workbenchpress.com

Workbench Press · Edition 1.0 · 2026

Questions: hello@workbenchpress.com