

THE

AI FIRST MARKETING GUIDE

Build Smarter.
Market Faster.
Grow Bigger.



WHO THIS GUIDE IS FOR.

This guide is for small business owners, service-based founders, consultants, and local businesses who are tired of doing everything manually.

You're generating leads through LinkedIn, referrals, or showing up every day. But somewhere between "they found you" and "they became a client," the system breaks. Because there is no system.

Every page covers one AI-powered system you can implement right now. Some you can do yourself. Some you'll want help with. All of them will make you more money with less manual effort.

THIS GUIDE COVERS

- 01 **MISSED CALL TEXT-BACK**
- 02 **AI CHATBOT & WEBSITE CONCIERGE**
- 03 **SPEED-TO-LEAD CALL SYSTEM**
- 04 **DATABASE REACTIVATION**
- 05 **AUTOMATED REVIEW & REPUTATION**
- 06 **AI APPOINTMENT BOOKING**
- 07 **LEAD NURTURE & FOLLOW-UP SEQUENCES**
- 08 **AI-POWERED CONTENT & SOCIAL SYSTEM**
- 09 **UNIFIED DASHBOARD & REPORTING**

YOUR MARKETING ISN'T BROKEN. IT'S MANUAL.

In 2026, AI has made it possible for a one-person business to operate with the marketing infrastructure of a company ten times its size. But most small businesses are still doing it the old way — manually responding, chasing leads through their inbox, and losing clients to competitors who simply responded faster.

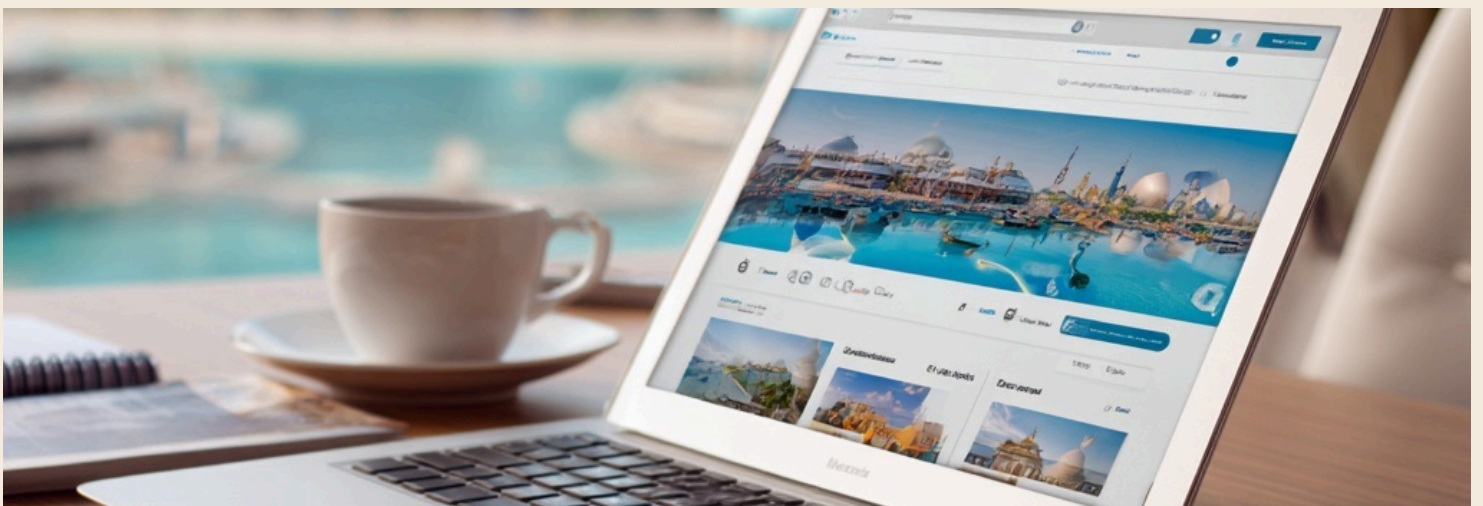
78%
THE FIRST RESPONDER

<5 MIN
RESPONSE WINDOW

60%
A SECOND FOLLOW-UP



The businesses winning right now aren't better at their craft. They're better at their systems.



MISSED CALL TEXT-BACK

01

Never lose a lead to voicemail again.

WHAT IT DOES

Every time someone calls your business and you can't answer, the system automatically sends them a personalized text within seconds. The message introduces your business, answers common questions, and invites them to book or keep the conversation going — all without you touching your phone.

WHY IT MATTERS

85% of people who reach a voicemail will not call back. They move onto the next option. A text-back keeps you in the conversation even when you're unavailable.

REPLACES

Voicemail. Manual callback lists. Post-itnotes.



EXPECTED RESULT

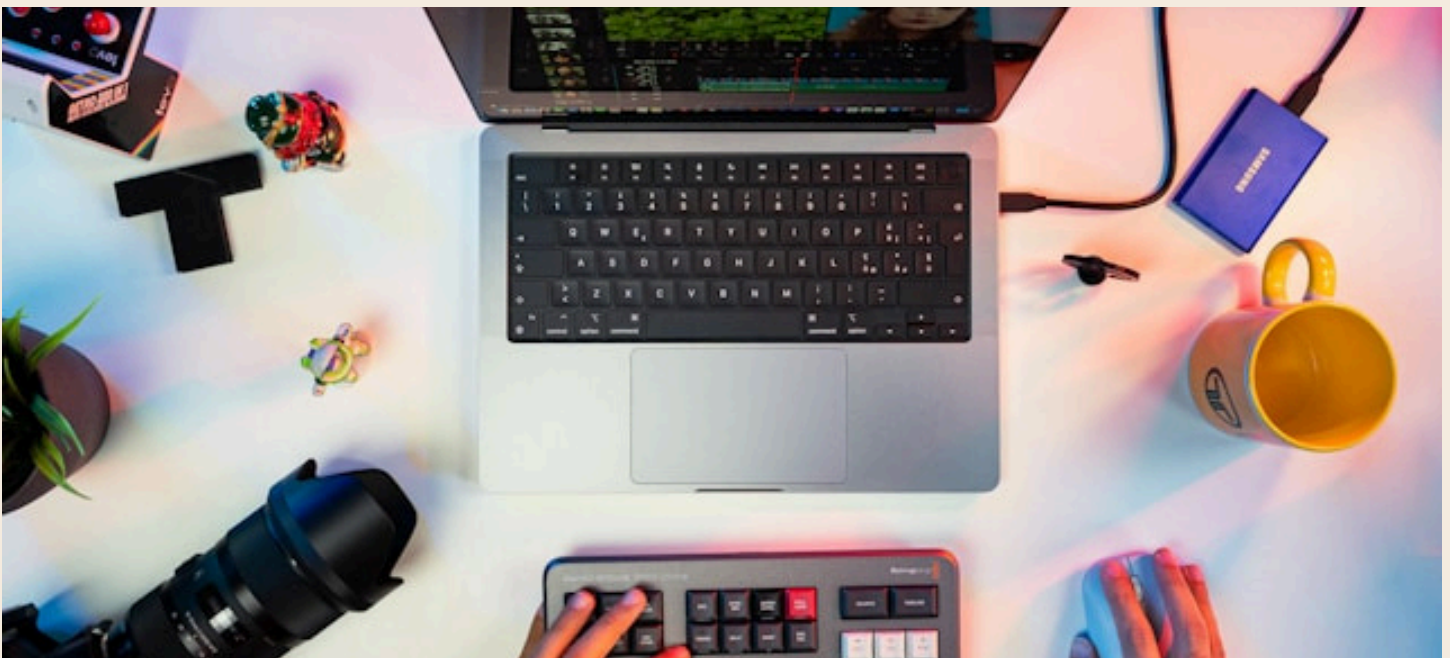
RECOVER 30–50% OF MISSED CALLS

IMPLEMENTATION CHECKLIST.

- Set up call forwarding or missed call trigger
- Write your auto-text (personalized, not robotic)
- Connect text response to your CRM
- Set follow-up sequence for non-replies (30 min)
- Test the full flow with your own number
- Review weekly: missed calls recovered

PRO TIP

The text should feel like it came from you. Use your name, reference your business, give one clear next step. "Hey, this is Edwin — sorry I missed you. What's the best time to connect?"



AI CHATBOT & WEBSITE CONCIERGE

Your best salesperson—available 24/7.

WHAT IT DOES

An AI-trained chatbot sits on your website and engages every visitor. It answers questions, qualifies leads, collects contact information, and books appointments—trained on your specific business, not a generic FAQ bot.

WHY IT MATTERS

Most website visitors leave without action. A well-trained AI chatbot turns passive browsers into active leads by starting the conversation before they click away.

REPLACES

Contact forms that sit unread. "We'll get back to you in 24 hours." Losing visitors who had questions.



EXPECTED RESULT

CAPTURE 3–5x MORE LEADS FROM EXISTING TRAFFIC

IMPLEMENTATION CHECKLIST.

- Define the 10 most common customer questions
- Write your chatbot personality and tone guidelines
- Train it on your services, pricing, and process
- Set up lead capture: name, email, phone, question
- Connect captured leads to your CRM
- Set escalation rules for human handoff
- Test with real visitor questions
- Review chat transcripts weekly to improve

PRO TIP

Name your chatbot something real. Give it a tone, a personality, and a purpose. The more it feels human and knowledgeable, the higher the conversion rate.



SPEED-TO-LEAD CALL SYSTEM

03

Respond in under 5 minutes. Win the deal.

WHAT IT DOES

The moment a new lead comes in from any source, the system triggers an immediate automated response and notifies you with their information. For high-value leads, it can initiate an automatic outbound call connecting you the moment you answer.

WHY IT MATTERS

The company that responds first wins the majority of deals. After 5 minutes, connection rates drop 80%. After an hour, most leads have already decided.

REPLACES

Checking email hourly. Discovering yesterday's leads. Phone tag.



EXPECTED RESULT

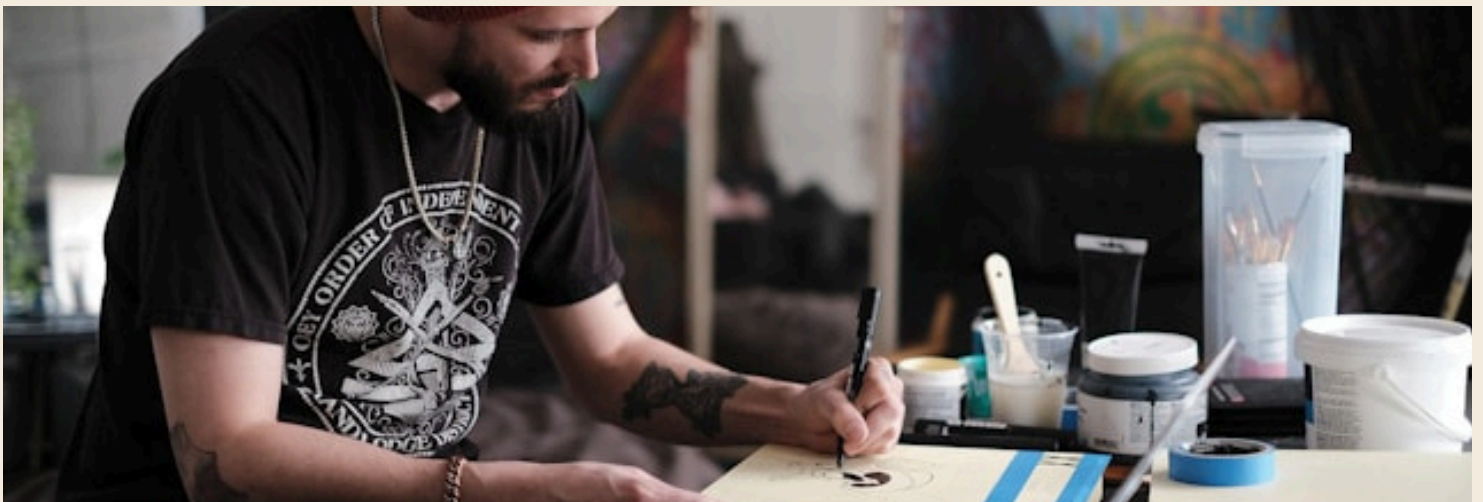
50–70% HIGHER CONTACT RATE

IMPLEMENTATION CHECKLIST.

- Map every lead source (website, LinkedIn, ads, referrals)
- Connect each source to your CRM automatically
- Set up instant email + SMS notification for new leads
- Write immediate auto-response per channel
- Set up follow-up call trigger for high-value leads
- Define qualified lead criteria for instant routing
- Build 3-touch sequence for non-responders (1 hour)
- Track response time weekly — aim for under 5 min

PRO TIP

The speed-to-lead system is useless if your auto-response sounds like a robot. Write it the way you'd actually text a real person. Personalize with their name if possible.



DATABASE REACTIVATION

04

Your best leads are already in your contacts.

WHAT IT DOES

You have old leads, past clients, and contacts who went quiet. This system sends reactivation campaigns via text, email, or both — designed to restart conversations and generate bookings from people who already know you.

WHY IT MATTERS

A past contact who knows you converts at 5–10x the rate of a cold lead. Most businesses have hundreds of these sitting in their CRM doing nothing.

REPLACES

Spending more on ads to find new leads when revenue is sitting in your existing database.



EXPECTED RESULT

\$5,000–\$30,000 IN REVENUE WITHIN 30 DAYS

IMPLEMENTATION CHECKLIST.

- Export all past leads and clients from CRM/email/sheets
- Segment: past clients vs. unconverted vs. old inquiries
- Write reactivation message for each segment
- Set up 3-message sequence: Day 1, Day 3, Day 7
- Include a clear, low-friction offer or CTA
- Track replies — move respondents to active pipeline
- Remove unsubscribes after the sequence
- Run reactivation campaigns every 90 days

PRO TIP

Best reactivation message: "Hey [Name], going through my contacts and realized we never connected on [topic]. Still relevant?" Short. Real. No pitch.



AUTOMATED REVIEW & REPUTATION

Get 5-star reviews without asking manually.

WHAT IT DOES

After every completed job, the system automatically sends review requests via text and email—timed perfectly, linked directly to Google. Negative experiences get caught privately before going public.

WHY IT MATTERS

92% of consumers read reviews before choosing a provider. Businesses with 50+ reviews convert dramatically better than those with fewer than 10.

REPLACES

Manually remembering to ask. Awkward in-person requests. Having 3 reviews while competitors have 200.



EXPECTED RESULT

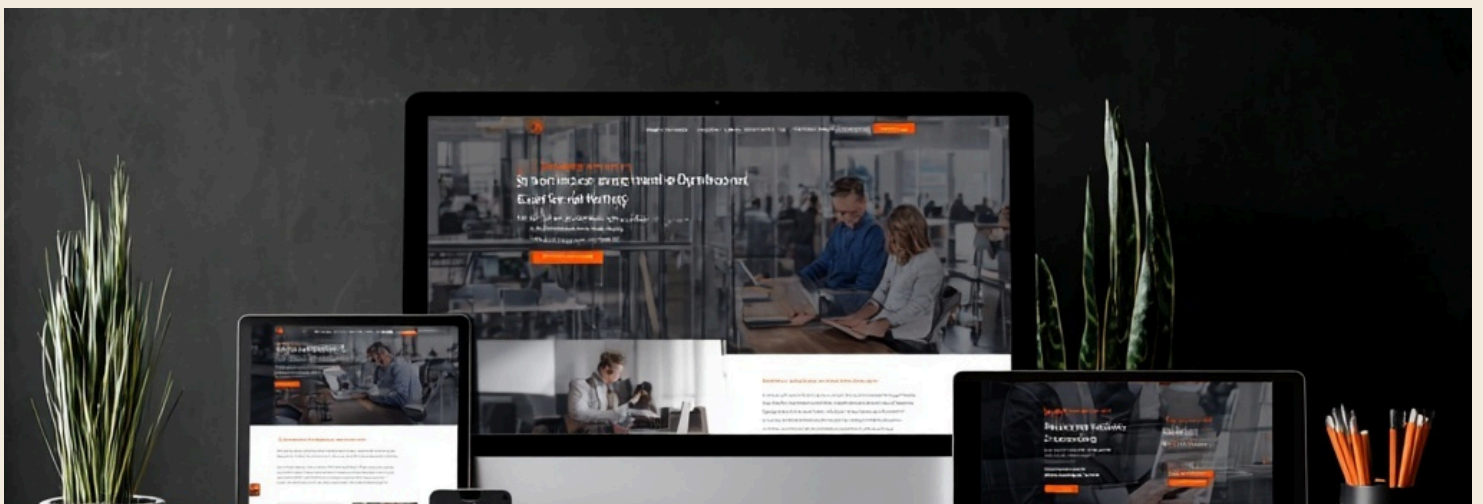
5–10x REVIEW VELOCITY IN 60 DAYS

IMPLEMENTATION CHECKLIST.

- Connect "job completed" trigger to review system
- Write 2-3 message review request sequence
- Time first message: 24-48 hours after delivery
- Create direct link to Google Business review page
- Set up negative experience private redirect
- Monitor and respond to reviews within 24 hours
- Display review count on your website (auto-updating)
- Monthly report: count, average rating, trend

PRO TIP

Send the first request via text, not email. Text open rates are 98% vs 20% for email. Keep it short: "If you have 60 seconds, a quick Google review means the world."



AI APPOINTMENT BOOKING

06

From interested to booked — automatically.

WHAT IT DOES

Integrated into your website, chatbot, and follow-up sequences. Prospects self-schedule into your calendar without back-and-forth. Real-time availability, confirmations, and automatic reminders before the call.

WHY IT MATTERS

Every scheduling email is a friction point where you lose leads. When someone is ready to talk, they want to book now—not wait for your calendar options tomorrow.

REPLACES

Calendly links buried in signatures. Scheduling back-and-forth. No-shows.



EXPECTED RESULT

40–60% FEWER NO-SHOWS

IMPLEMENTATION CHECKLIST.

- Set up booking calendar with correct availability
- Define meeting types: discovery, strategy, etc.
- Write booking confirmation message
- Set reminder sequence: 24 hours + 1 hour before
- Connect booking to CRM as new contact record
- Add booking link to website, email sig, LinkedIn
- Embed booking inside AI chatbot flow
- Track: show rate, no-show rate, weekly bookings

PRO TIP

Add a short intake form to your booking. 2-3 qualifying questions before the call filters unqualified leads and means you arrive already knowing what they need.



LEAD NURTURE & FOLLOW-UP

07

Stay top of mind until they're ready to buy.

WHAT IT DOES

Pre-built email and SMS sequences that keep you in front of every lead with value-driven messages, case studies, and soft CTAs.

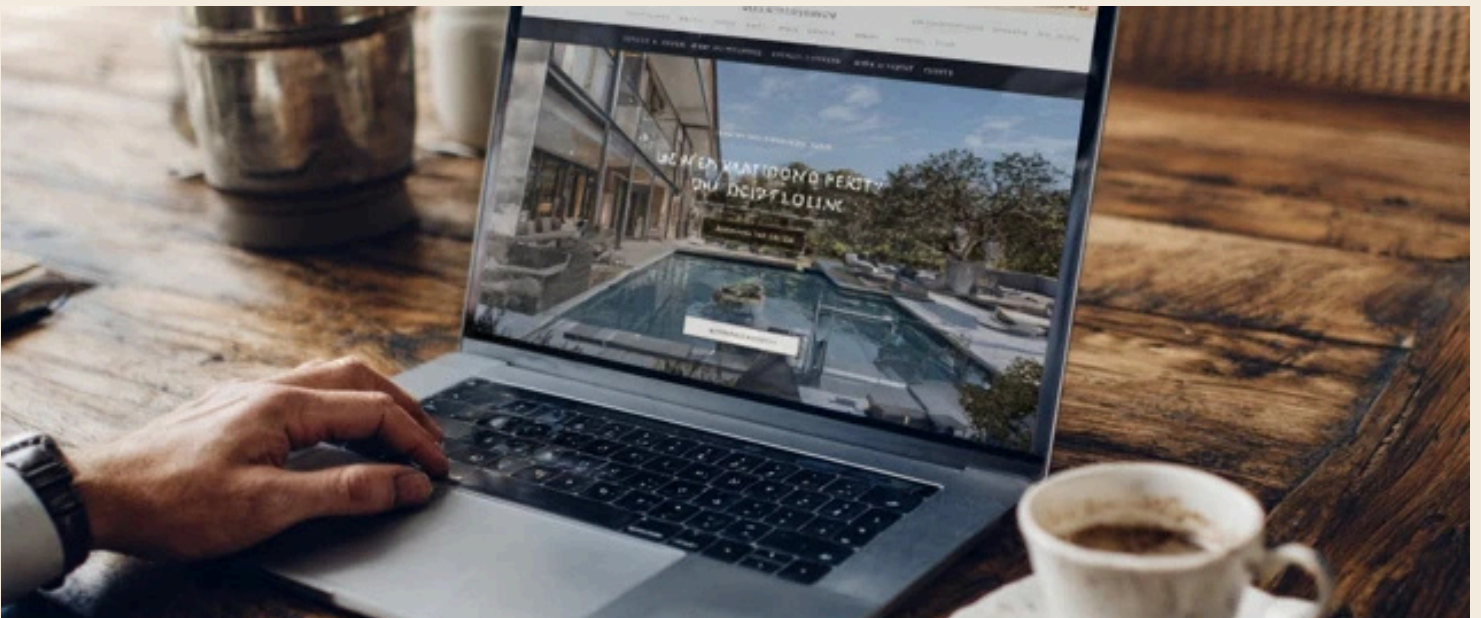
Runs automatically based on pipeline stage.

WHY IT MATTERS

It takes 8 touchpoints on average before a prospect decides. Most businesses give up after 1 or 2. Automated nurture keeps you showing up on touchpoint 8 while competitors have walked away.

REPLACES

Manually remembering to follow up. Leads going cold after one email. Revenue lost to "I forgot."



EXPECTED RESULT

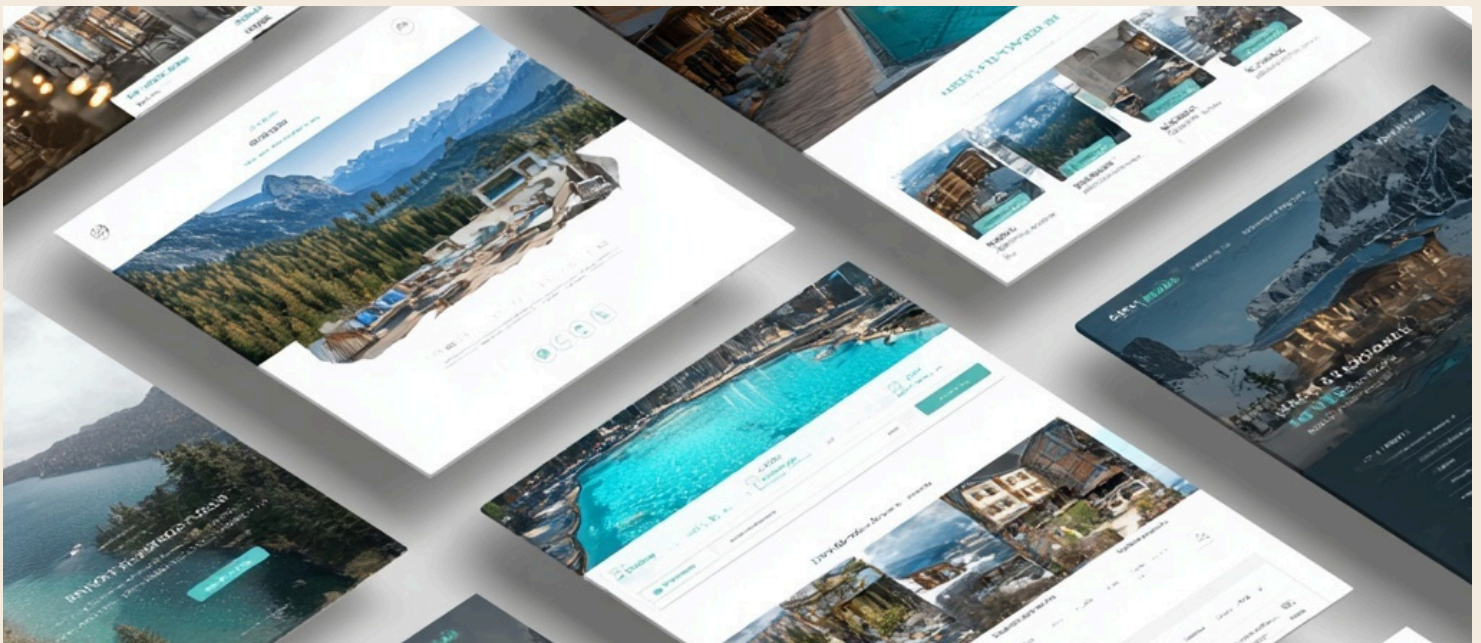
20–35% OF DEAD LEADS CONVERT IN 90 DAYS

IMPLEMENTATION CHECKLIST.

- Map your buyer's typical decision timeline
- Write a 5-email welcome/intro sequence
- Build 30-60-90 day nurture with value, not just pitches
- Create SMS check-ins: Day 3, Day 14, Day 30
- Trigger sequences by behavior (opened, cancelled, etc.)
- Write a "break-up" message for end of sequence
- Track: open rate, click rate, reply rate, conversions
- Refresh sequence content every quarter

PRO TIP

80% value, 20% ask. Share a client result, answer a common question, send a useful article. When you do ask, the CTA feels earned — not pushy.



AI CONTENT & SOCIAL

08

Show up everyday without burning out.

WHAT IT DOES

An AI-assisted content system that turns your expertise into LinkedIn posts, email newsletters, and short-form content.

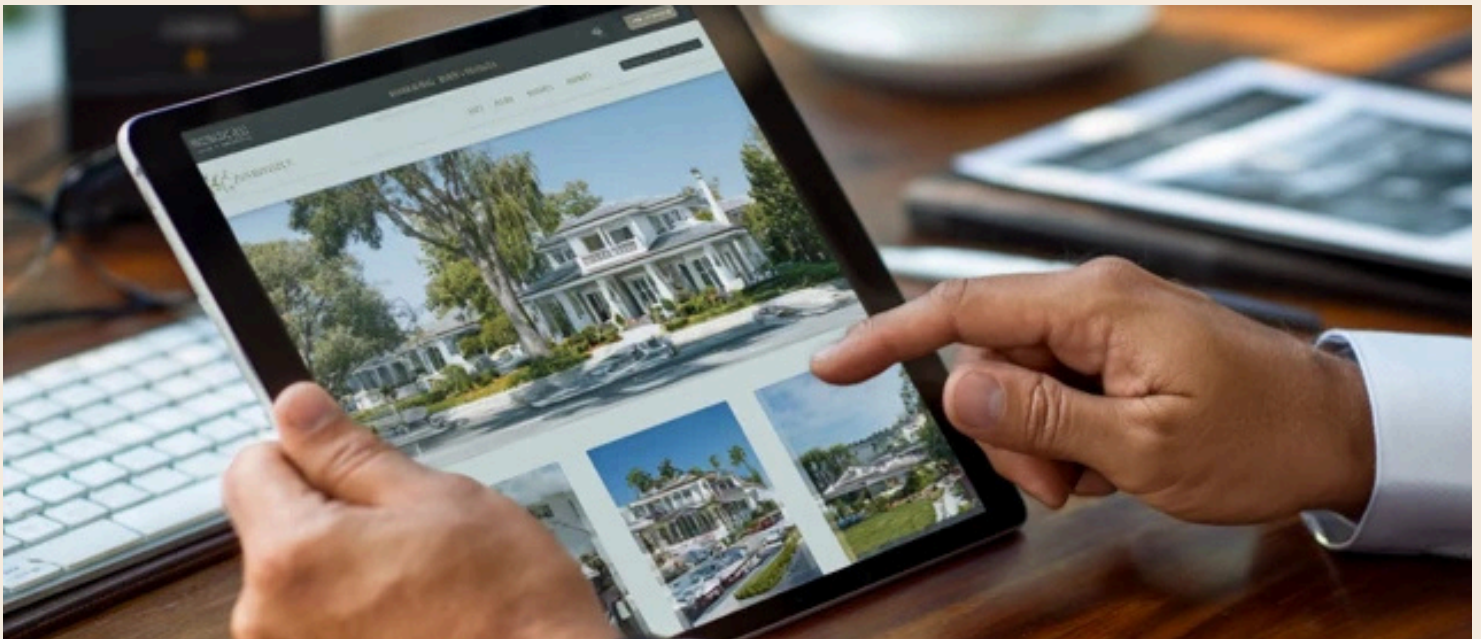
Combined with scheduling, you publish daily without spending 3 hours writing every morning.

WHY IT MATTERS

Consistency wins on LinkedIn and email. The algorithm rewards showing up. But most founders burn out creating content manually and go dark for weeks, losing all momentum.

REPLACES

Starting from scratch daily. Inconsistent posting. Hours spent on content that should take minutes.



EXPECTED RESULT

3-5x CONTENT OUTPUT, SAME TIME

IMPLEMENTATION CHECKLIST.

- Define your content pillars: 3-5 topics you own
- Set up AI writing assistant trained on your voice
- Build content calendar: frequency + format per channel
- Create idea capture system (voice memo to post)
- Set up auto-scheduling for LinkedIn and email
- Repurpose: 1 long post = 3 short + 1 email
- Track: impressions, engagement, followers, inbound leads
- Batch creation: 1 session per week, schedule the rest

PRO TIP

Each daily AI Marketing News post can become 3 pieces: the LinkedIn post, a short email, and a website article. One idea, three touchpoints.

UNIFIED DASHBOARD & REPORTING

See your entire business in one view.

WHAT IT DOES

A single dashboard aggregating all system data — leads, calls, messages, reviews, revenue — into one clean view. 15 minutes a week instead of logging into seven platforms.

WHY IT MATTERS

You can't improve what you can't see. Most owners have no idea how many leads they're losing or which channel drives revenue.

A unified dashboard turns gut feeling into decisions.

REPLACES

Logging into Calendly, Mailchimp, CRM, Google Analytics, and spreadsheets separately. Having no idea what's working.

EXPECTED RESULT

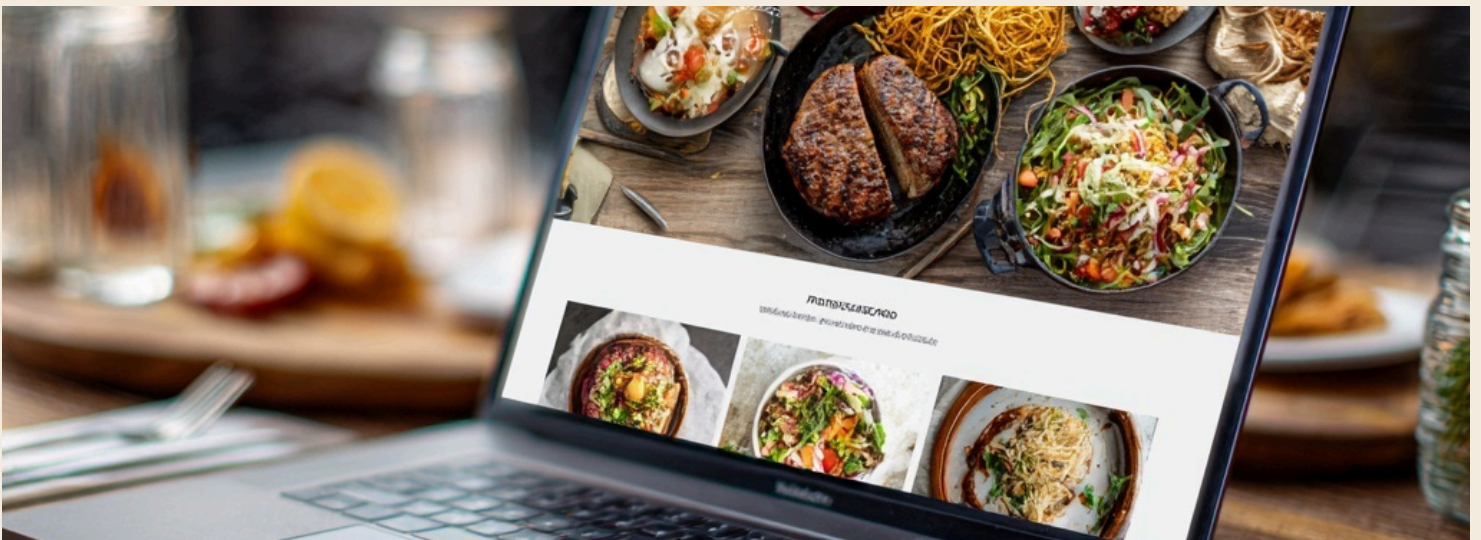
CLEAR VISIBILITY. NO GUESSWORK.

IMPLEMENTATION CHECKLIST.

- Connect all lead sources to a single CRM
- Set up pipeline: lead > contacted > qualified > closed
- Track: new leads, contact rate, booking rate, close rate
- Set up automated weekly performance summary email
- Create revenue dashboard: MTD, QTD, YTD
- Track source attribution: where are best clients from?
- Monthly review: what to cut, what to double down on
- Share relevant reports with team if applicable

PRO TIP

Pick 5 numbers. Not 50. New leads, contact rate, calls booked, proposals sent, clients closed. Move those 5, revenue follows.



THE MASTER CHECKLIST.

01 MISSED CALL TEXT BACK

- Auto-text triggers on missed call
- Connected to CRM Follow-up sequence active

02 AI CHATBOT

- Live on website
- Trained on services
- Leads connected to CRM

03 SPEED-TO-LEAD

- All sources connected
- Instant notifications live
- Auto-response under 5 min

04 DATABASE REACTIVATION

- Contacts imported & segmented
- First campaign sent
- 90-day schedule set

05 REVIEW SYSTEM

- Auto review request active
- Google link live
- Count displayed on site

06 APPOINTMENT BOOKING

- Calendar live on website
- Reminders active
- Intake form collecting info

07 LEAD NURTURE

- Welcome sequence live
- 30-60-90 day campaign active
- Pipeline segmented

08 CONTENT SYSTEM

- Content pillars defined
- AI assistant configured
- Weekly batch process active

09 UNIFIED DASHBOARD

- All systems in one CRM
- Pipeline view configured
- Weekly summary automated

YOU KNOW WHAT TO BUILD.



WE BUILD IT FOR YOU.

Every system in this guide—missed call text-back, AI chatbot, speed-to-lead, database reactivation, review automation, booking, lead nurture, content, and unified dashboard—can be fully built, configured, and running in your business within 7-14 days.

You don't need to piece it together. You don't need five vendors. You don't need weeks of tutorials. We build it. Custom to your business. Done for you.

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AI-powered from day one