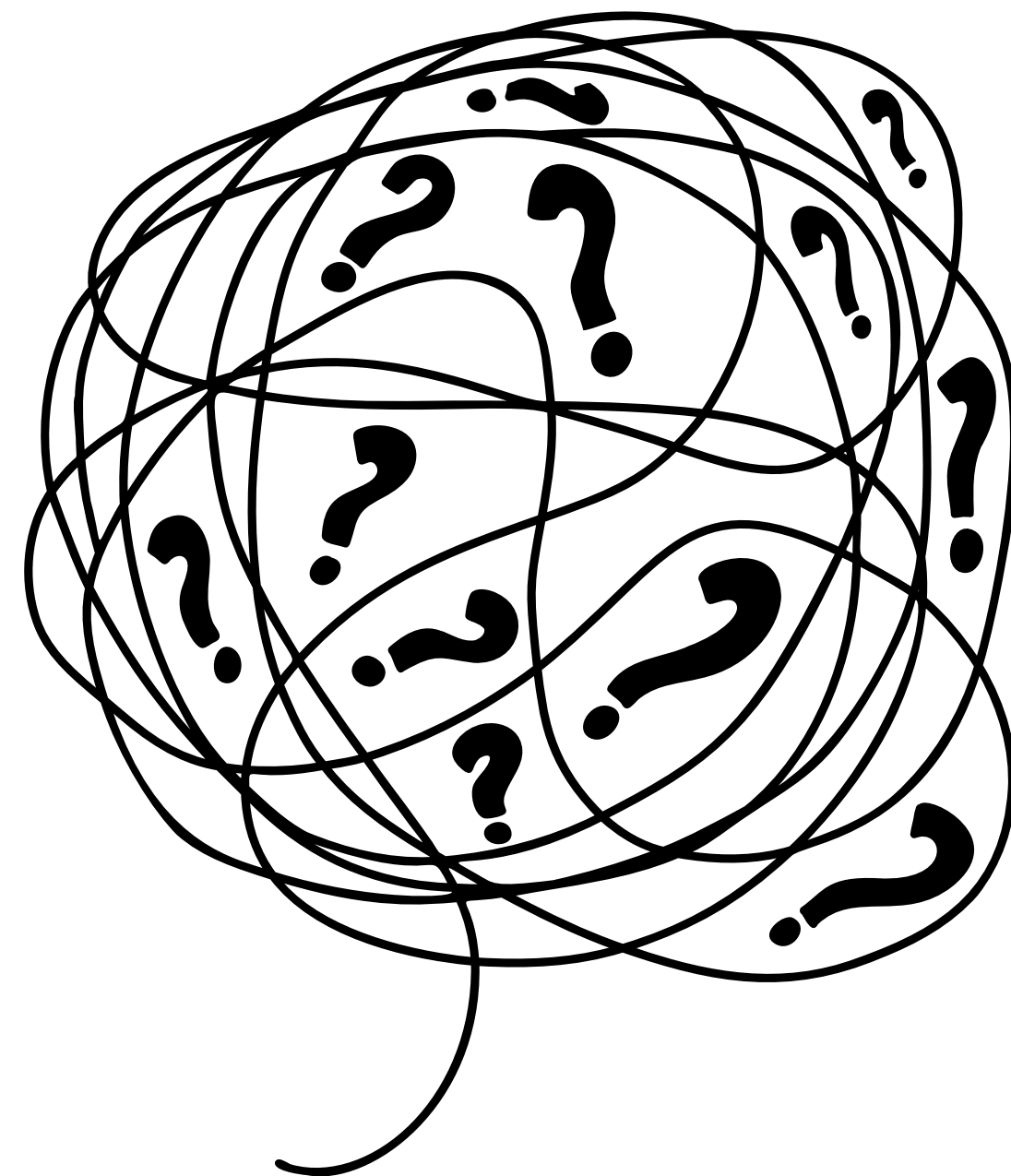


# Simple Systems

To Save 10+ Hours a Week  
in Your Business

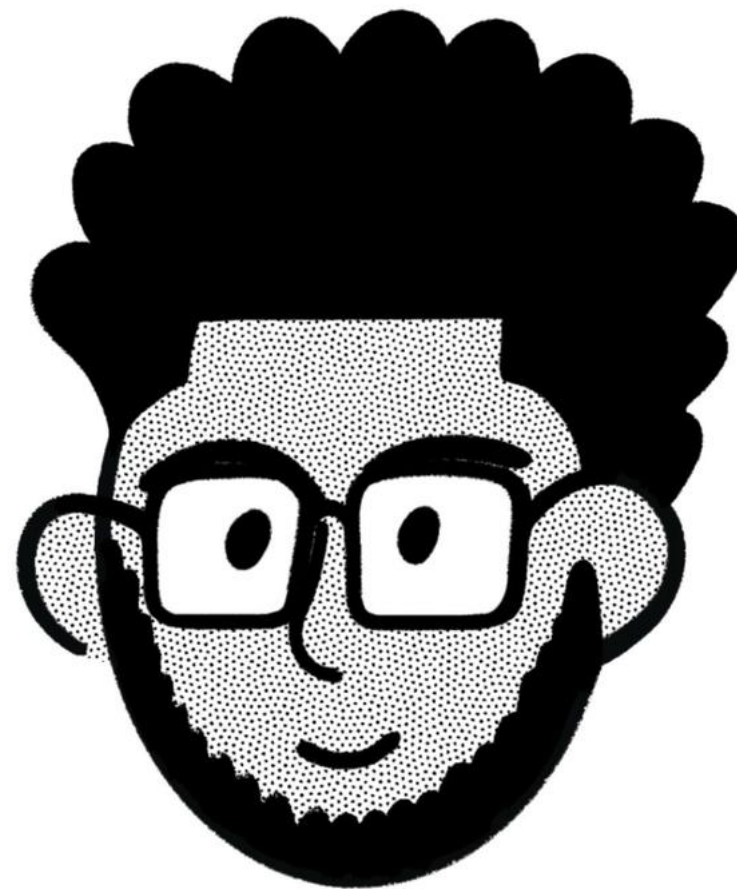


You're probably asking "who the heck is this guy?"



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

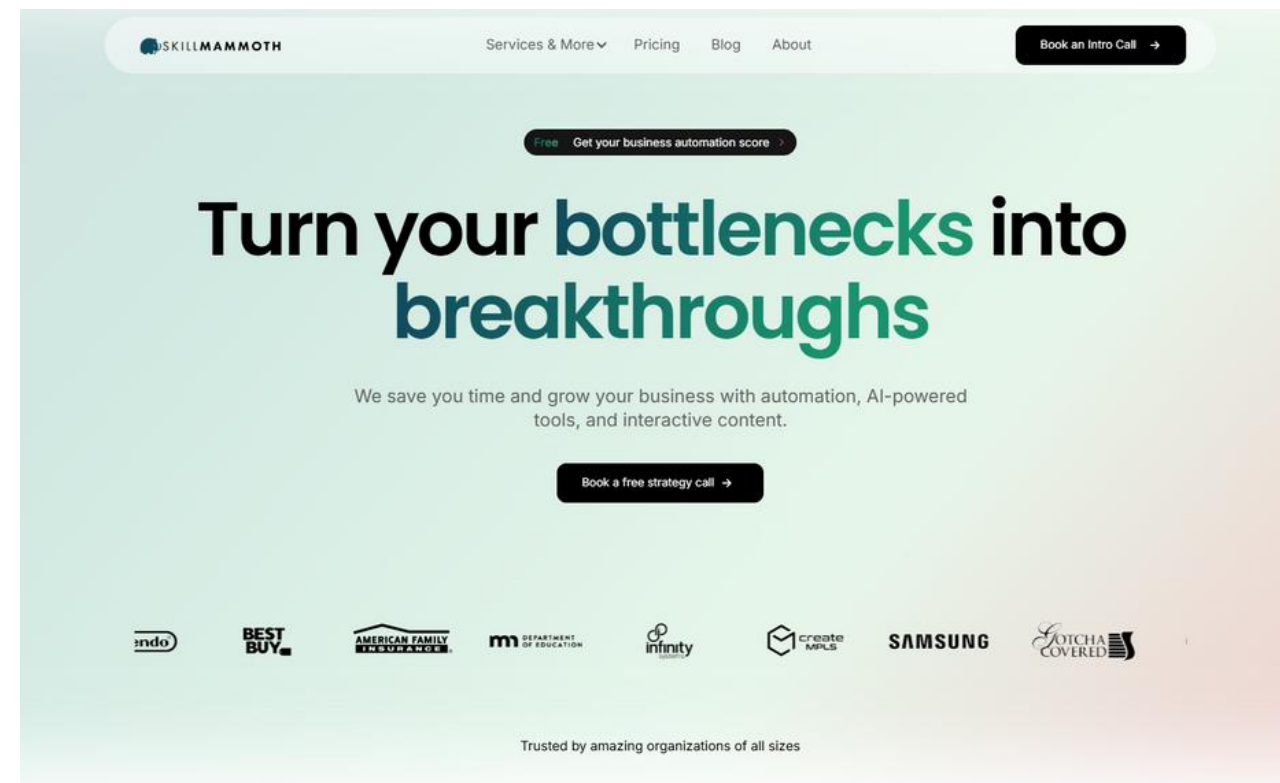
My name is Alex Storey



 SkillMammoth

Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

After 10 years in tech, I founded SkillMammoth in 2023 to help businesses **save time** and **boost productivity** through smart systems and automation.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

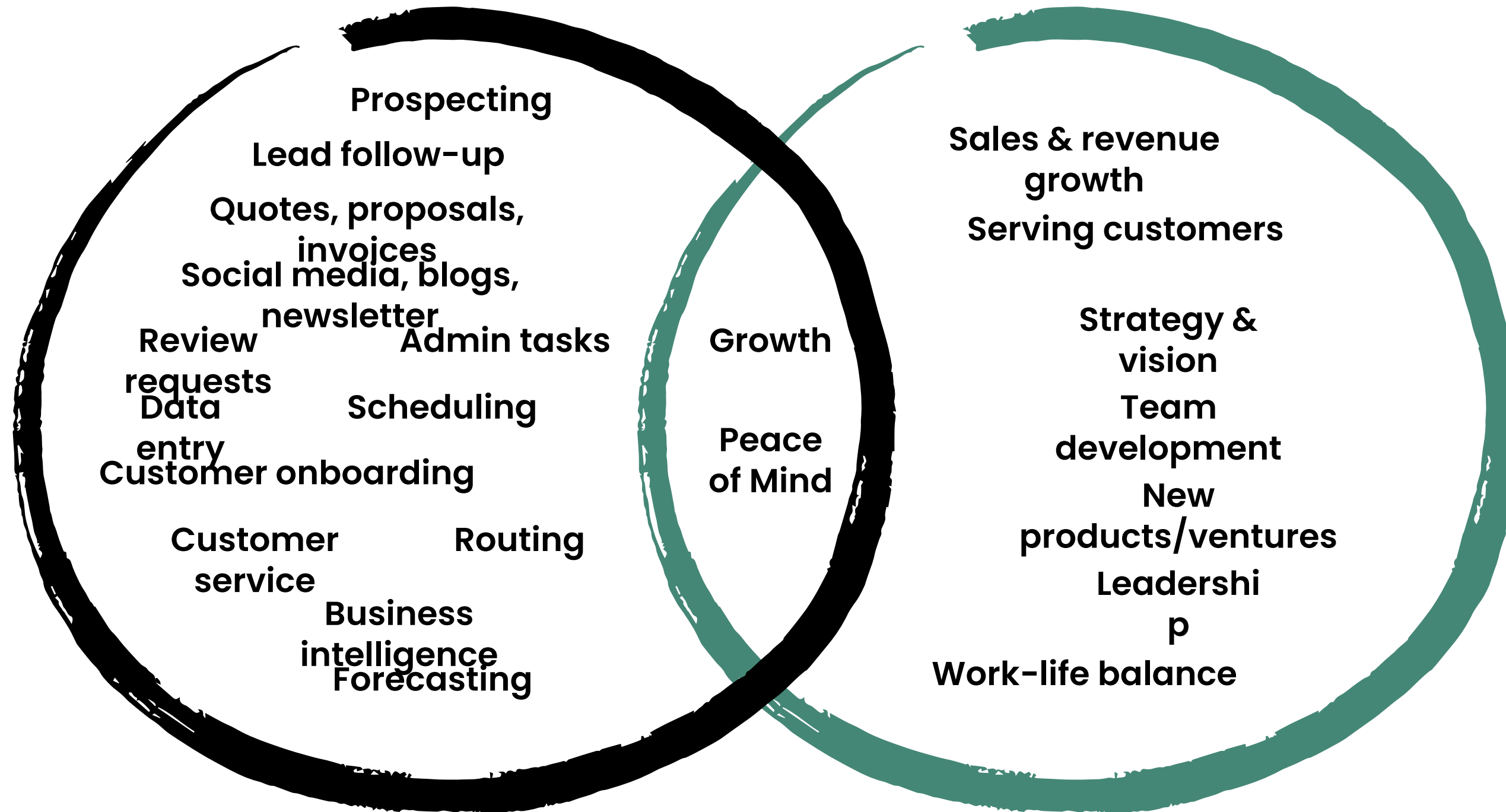
# We've served dozens of organizations



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

## Busywork we handle

## What SMBs can focus on instead



Get this, referral guide, and freebies at [skillmammoth.com/ypng](https://skillmammoth.com/ypng)

# Our Core Systems

Lead Gen &  
Nurturing

Social Media  
& Content

Customer  
Onboarding

Reputation  
Management



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

When I'm not saving businesses time, I spend time with my people, barbecue, and enjoy the outdoors.



 **SkillMammoth**

Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

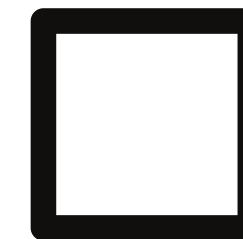
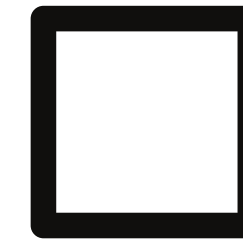
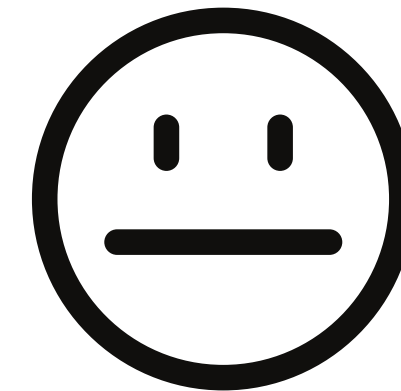
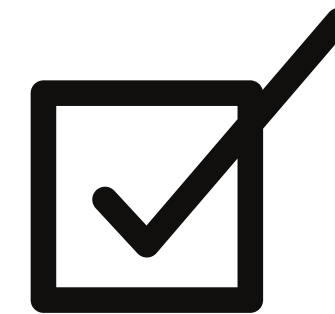
# Today's Game Plan

- Introduction
- The Cost of Wasted Time
- What's a System
- Deep dive into systems
- Q&A



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

First let's learn  
more about you.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Who are you?

## What type of business are you in?

Skilled trades (contractors,

Business services (coaching, consulting, creative)

Product-based (physical goods, manufacturing, e-commerce)

Digital/tech (apps, SaaS, online tools)

Healthcare (clinic, practice, wellness)

Other (tell us more in the Zoom chat!)

● Loading...

## How many people are on your team?

Just me!

2-10

11-50

51-100

100+

● Loading...



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Chat questions:

- What do you spend the most time on?
- Who is currently using systems in their business?
- What would you like to share tip-wise before we dive in?



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# The Cost of Wasted Time

Most small business owners lose 1.5+ hours a day to busywork

(That's over 3 weeks a year down the drain)



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

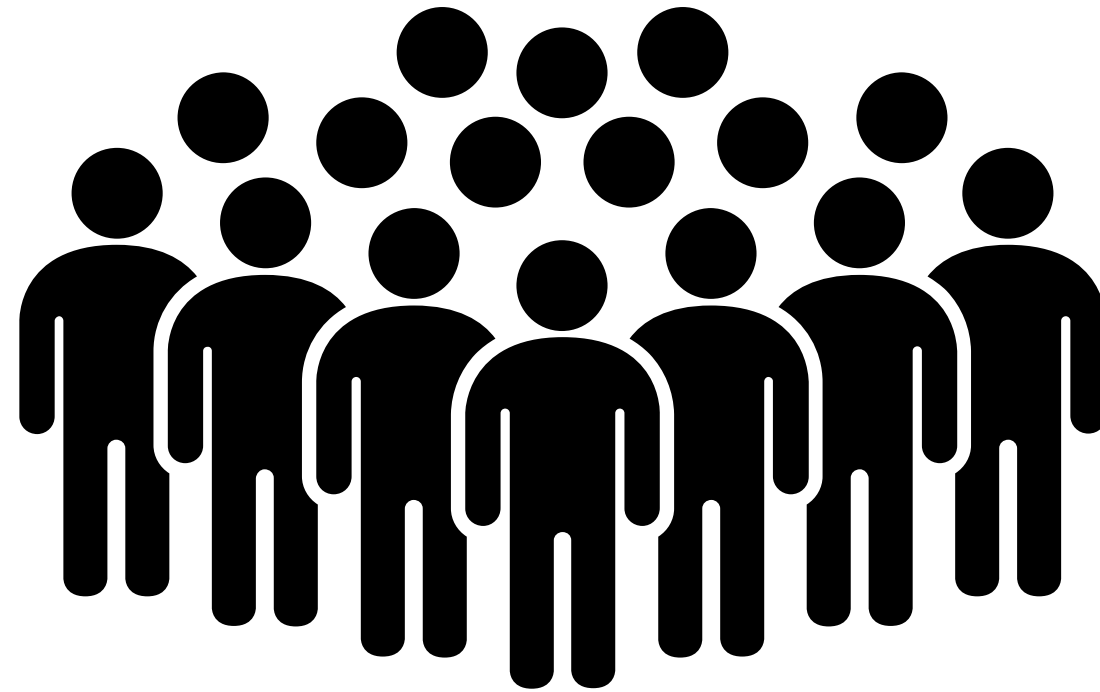


If you value yourself  
at \$50 an hour,  
that's **\$19500** a year  
in the toilet.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

So what is “system” exactly?  
(what are your thoughts, chat?)



 SkillMammoth

Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



A repeatable way of doing something that  
saves you time, energy, or brainpower

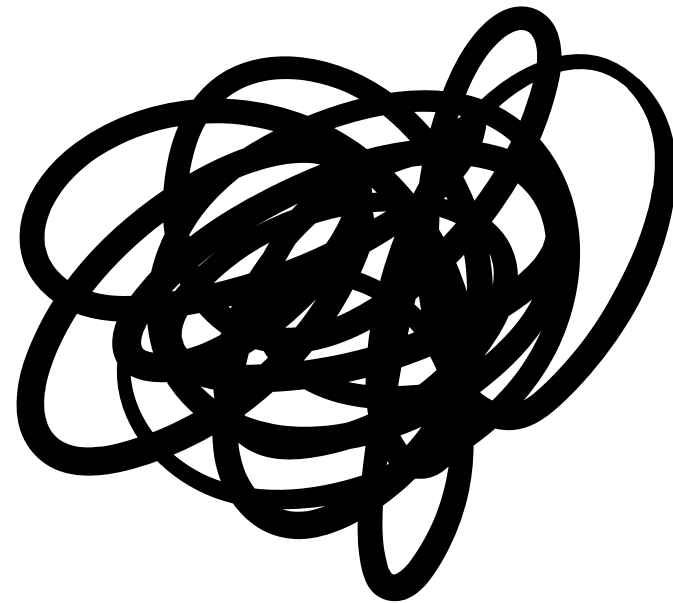


Bonus points if your system  
runs without you touching it!

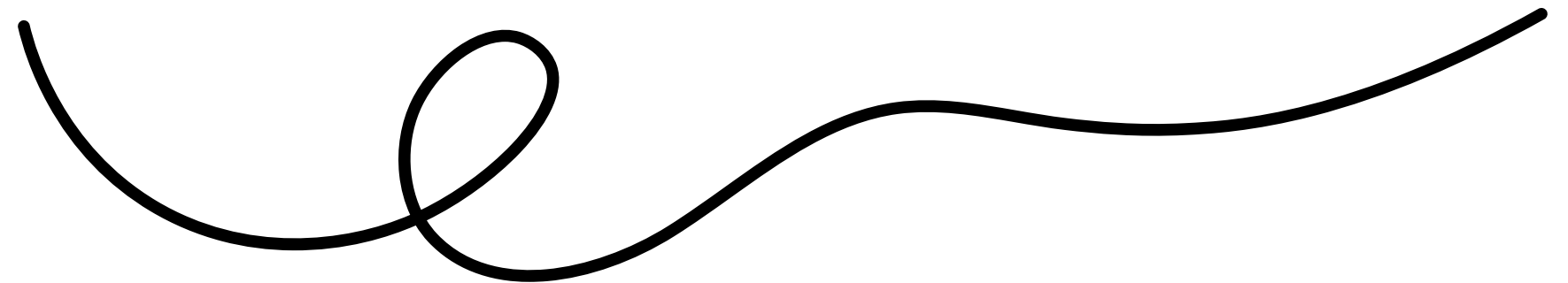


Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

Systems turn **this...**



**..into this.**

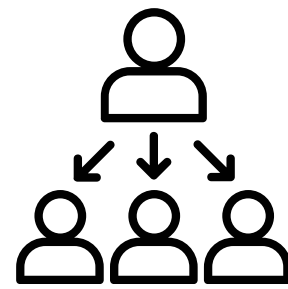


Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

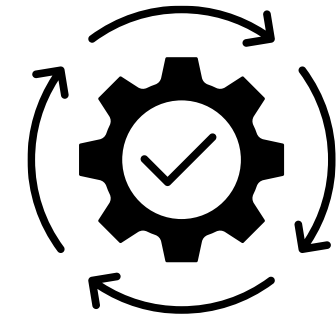
# There are three ways to systemize:



Document  
(good)



Delegate  
(better)



Automate (best  
when possible)



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



**Documentation** is the first step to saving time because if everything lives in your head, it can't be improved, delegated, or automated.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



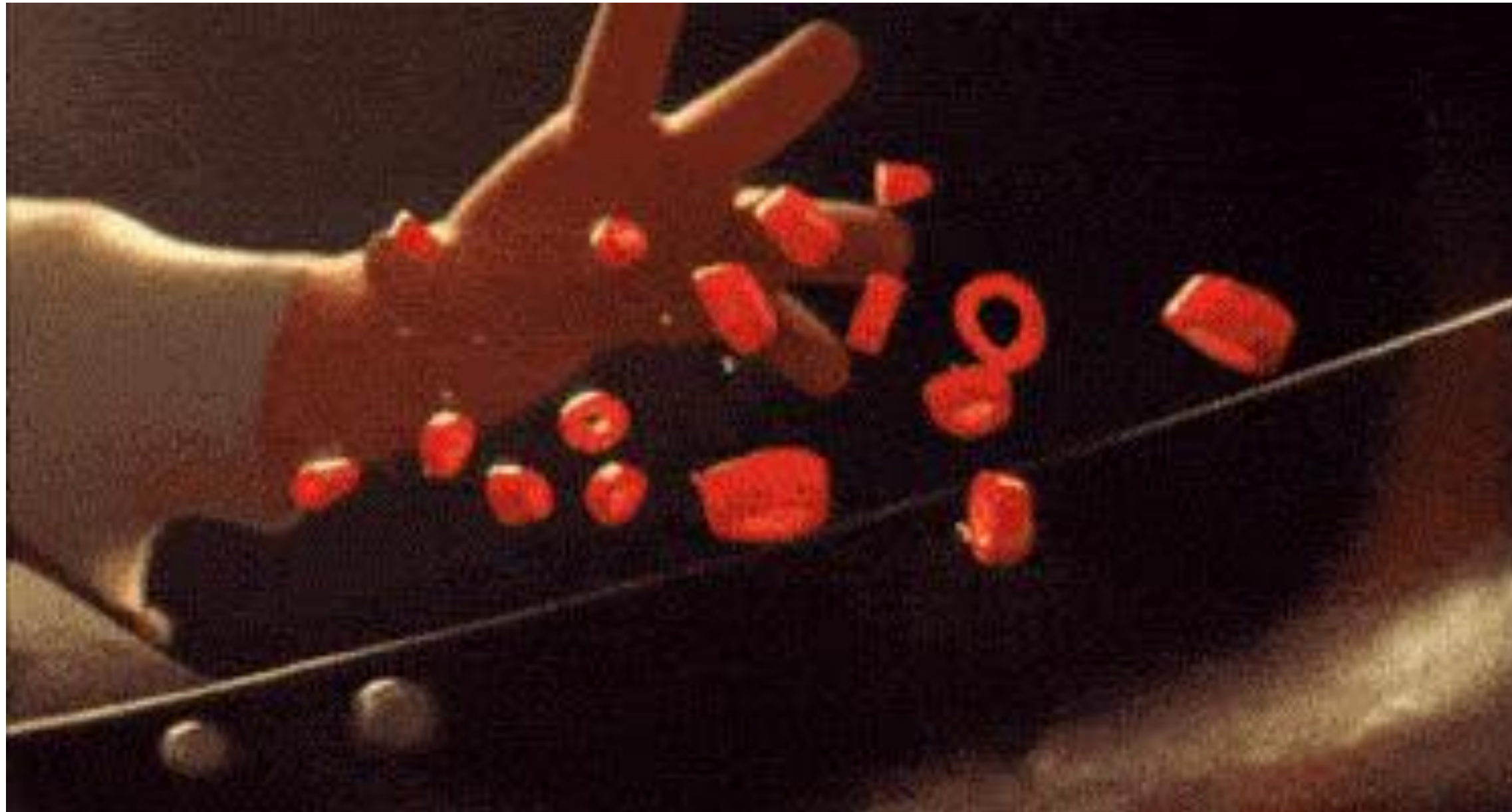
Your documentation **does NOT** have to be fancy. A good rule: bare minimum amount of information you need to get the task done.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



Think of documentation as the **recipe** for how you do something.



 **SkillMammoth**

Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# What to document first?



Tasks you do more than  
twice a week



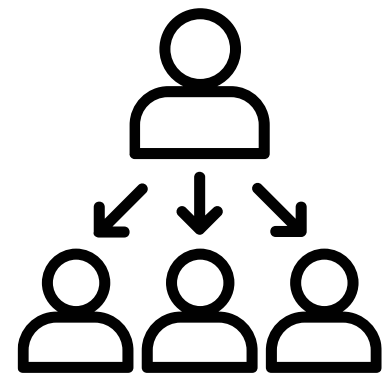
Instructions you've had to  
give more than once



Processes that often go  
sideways or get missed



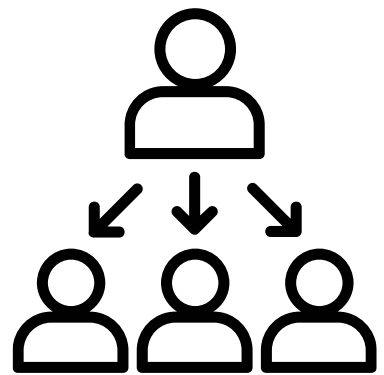
Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



**Delegation** is when you can hand work off to a teammate (or freelancer) so you can free up your mental space to focus on the work only you can do.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



This doesn't mean dumping tasks. Delegation only works when you've designed a process so good that someone else can run it. (Otherwise you're just going to be stuck putting out fires anyway.)



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# What to delegate first?



Tasks that are time consuming but low-value



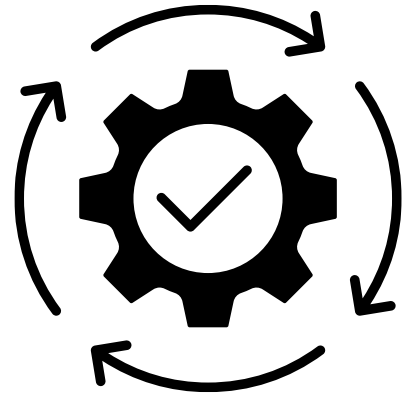
Anything that follows a clear set of steps



Customer service or triage (notably stuff that requires reasoning)



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



**Automation** is when you delegate to a tool or software instead of a person. Usually best for repeatable tasks like communication, logging info, posting on social, and more.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# What to automate first?



Repetitive tasks done the same way every time



Tasks that require speed or availability.



Moving info between apps or websites  
(copy/paste killers)



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Leverage Your Tools!

Automation Tools



AI Tools



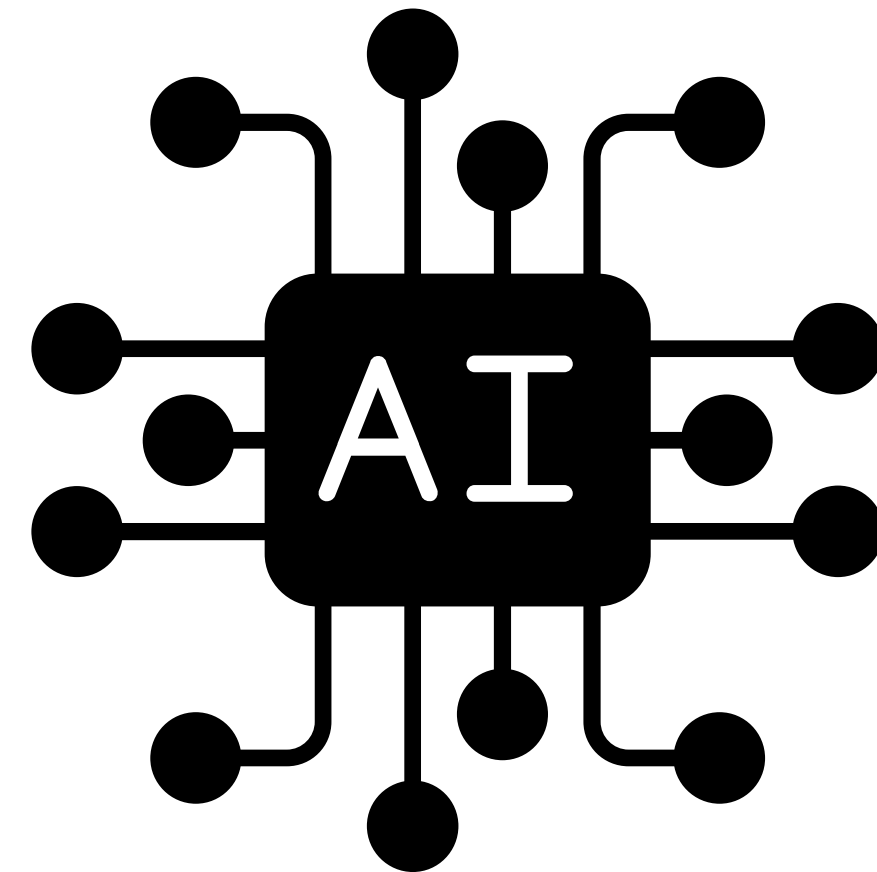
Tools with Built-In Automation



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Let's talk about the robot in the room..

Generative AI is making it easier than ever to automate your systems than ever before.



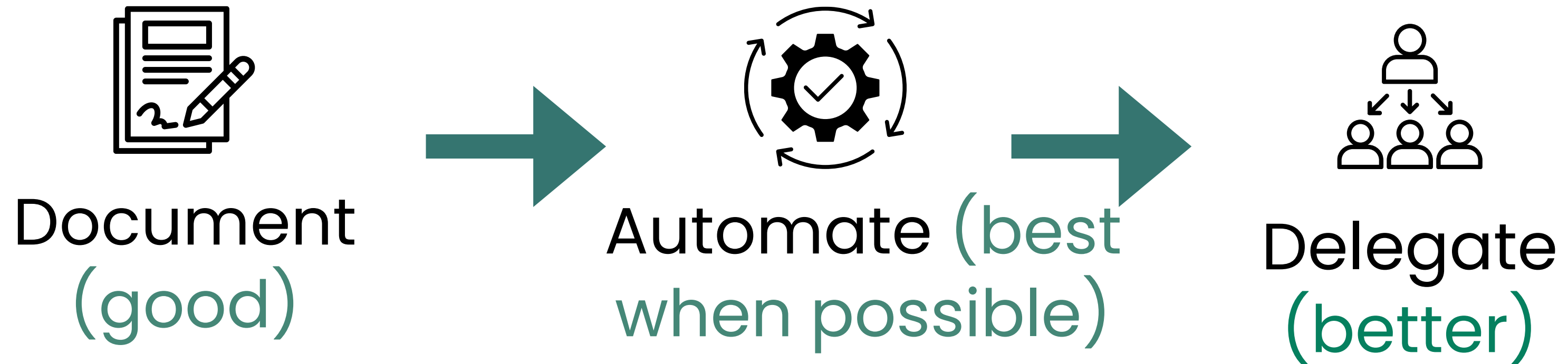
Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# The traditional systemization flow



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# The systemization flow with AI



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# System #1: Lead Nurturing



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# What are the big time sinks?

- Outreach
- Follow-Up
- Reminders
- Personalization



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

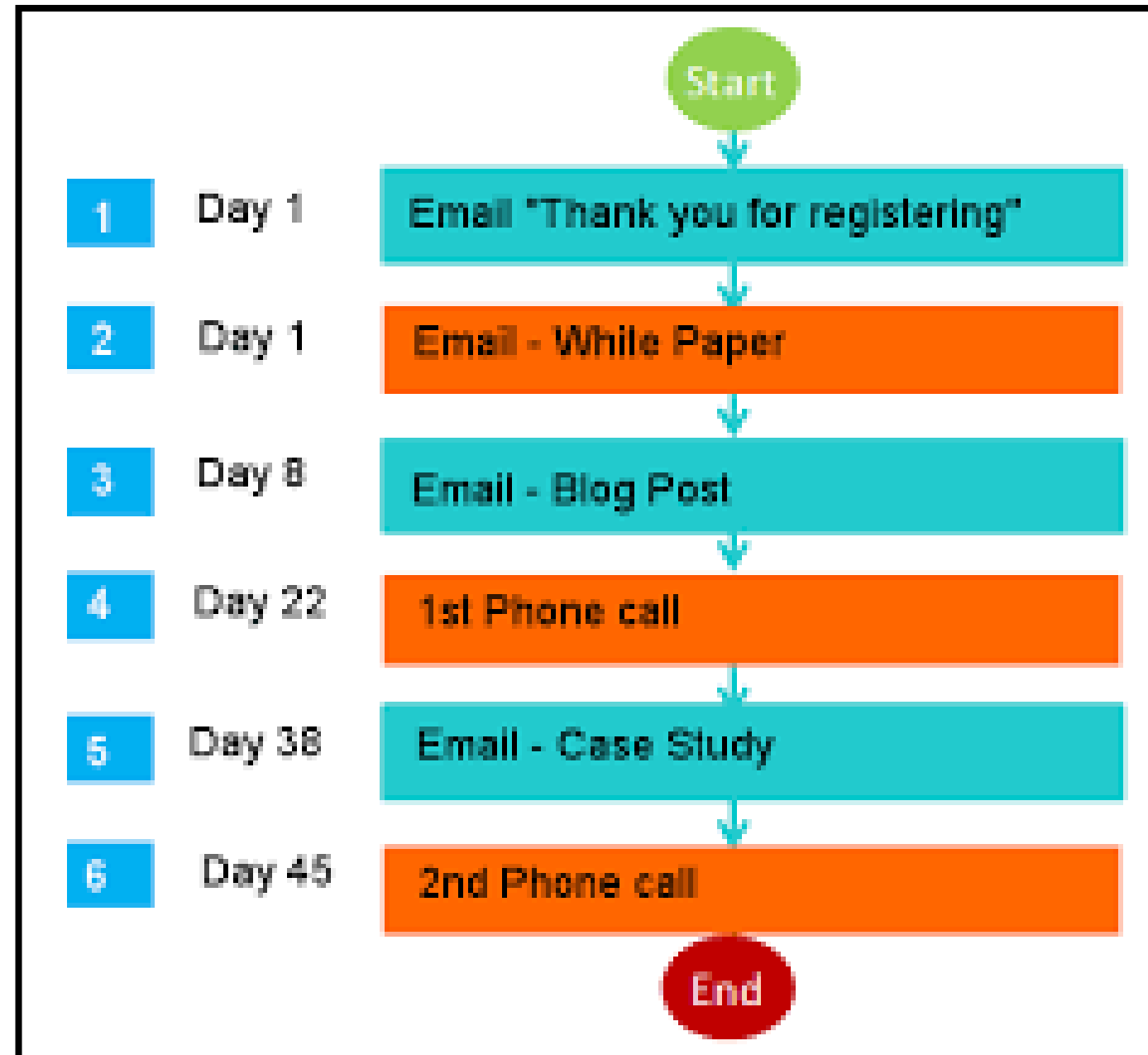


**Fact:** if you respond to an inbound inquiry **within one minute**, you increase your chance of closing by **391%**



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Example Lead Nurture Sequence



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Apply this to ANY of the following:

- Reminder about appointment (reduce no-shows)
- Post proposal campaign (show value and maximize close rate)
- Post project campaign (maximize chance upsell or re-engagement)



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



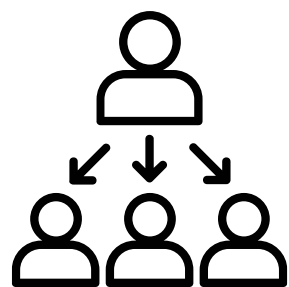
## Lead Nurture Documentation Example: Template

Ryan was following up with leads whenever he “got a chance,” which often meant never. He wrote down his ideal follow-up flow — a friendly intro email, a second check-in 3 days later, and a final message with a quote.

Now, every time a new lead comes in, he copies the same email templates and follows the same checklist. It’s still manual, but it’s consistent—and he doubled his replies just by not winging it.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



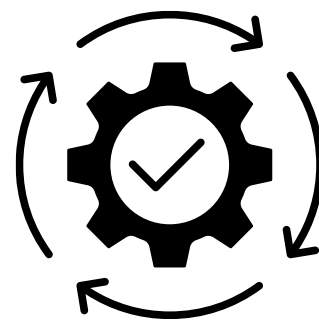
## Lead Nurture Delegation Example

Lisa had her process written out, but she was the bottleneck. She hired a VA for 5 hours a week and trained her to run the lead nurture checklist.

Her VA now sends out emails, tracks replies, and schedules follow-ups on Lisa's calendar. Lisa just shows up to the warm leads. It's the first time in months she's not buried in admin.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



## Lead Nurture Automation Example

Jordan used to lose track of inbound leads coming from his website. Now, when someone fills out his lead form, it triggers a flow in Make.com:

- Adds them to his CRM
- Sends a personalized welcome email instantly
- Starts a 2-week email sequence with tips and testimonials
- Alerts him if someone replies or books a call

Jordan hasn't manually followed up with a lead in six months—and his close rate has gone up.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# System #2: Social Media & Content



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# What are the big time sinks?

- Posting to so many platforms manually
- Ideation (I don't know what to say)
- No time to engage



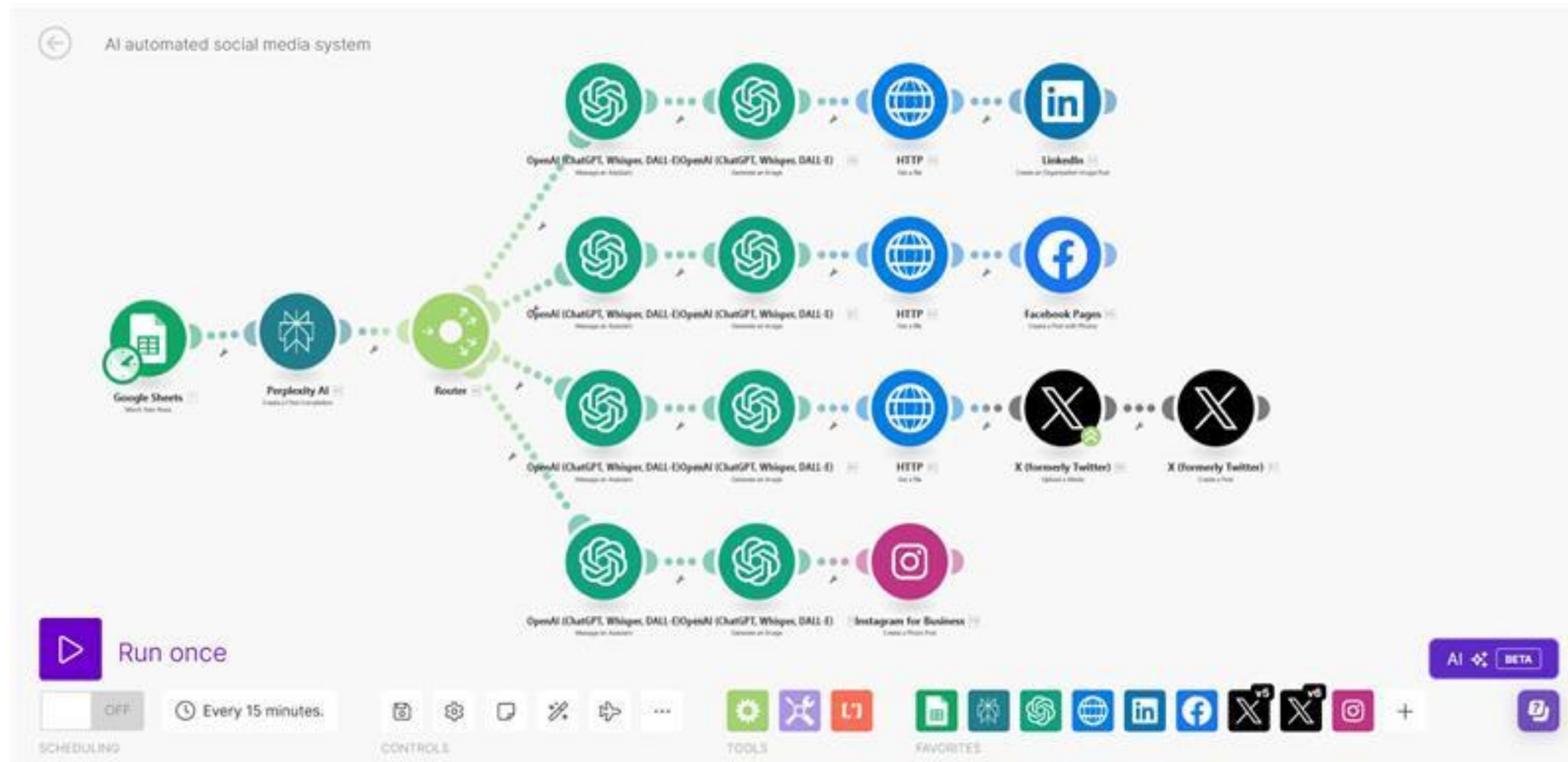


**Fact:** “63% of small business owners say social media is their biggest marketing challenge—but only 1 in 5 have a consistent content strategy.”



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Example Social Media Sequence



 **SkillMammoth**

Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



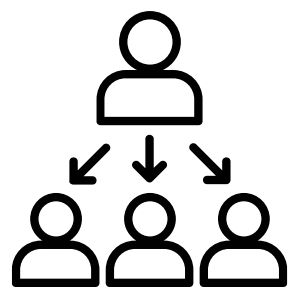
## Social Media Documentation Example

Rachel was tired of staring at a blank screen every week trying to write new Instagram posts. So she created a “Content System” in Notion – a list of her go-to post types: behind the scenes, customer testimonials, product features, and quick tips.

She wrote caption templates for each one and saved a folder of reusable images. Now, when it’s time to post, she picks from her library instead of starting from scratch.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



## Social Media and Content Delegation Example

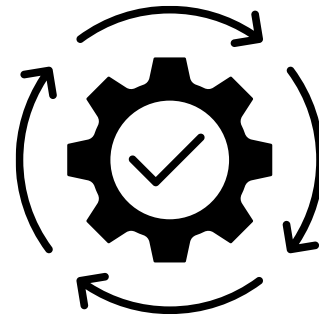
Tyrell had years of before-and-after photos sitting on his phone. He hired a college intern to handle posting.

He documented his content types and brand voice, and gave them access to a Canva folder with templates.

Each week, the intern schedules posts using Buffer. Tyrell just gives it a quick thumbs-up—and his social is more active than ever.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



## Social Media & Content Automation Example

Nia turned her blog posts into months of content using automation. She uses a tool that breaks each blog post into social blurbs and automatically schedules them in a content calendar.

She set up a Make.com scenario that:

- Scrapes existing blog to learn Nia's voice
- Researchs current trends in her industry.
- Creates a Google Doc Blog Post
- Formats for different platforms
- Sends it to Buffer to auto-post on Facebook, Instagram, and LinkedIn

She now has 3 months of content queued up—and she didn't even log in to Instagram this week.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# System #2: Customer Onboarding



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# What are the big challenges with client onboarding?

- Personalization
- Time to Value
- Scattered info
- Too much back and forth



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



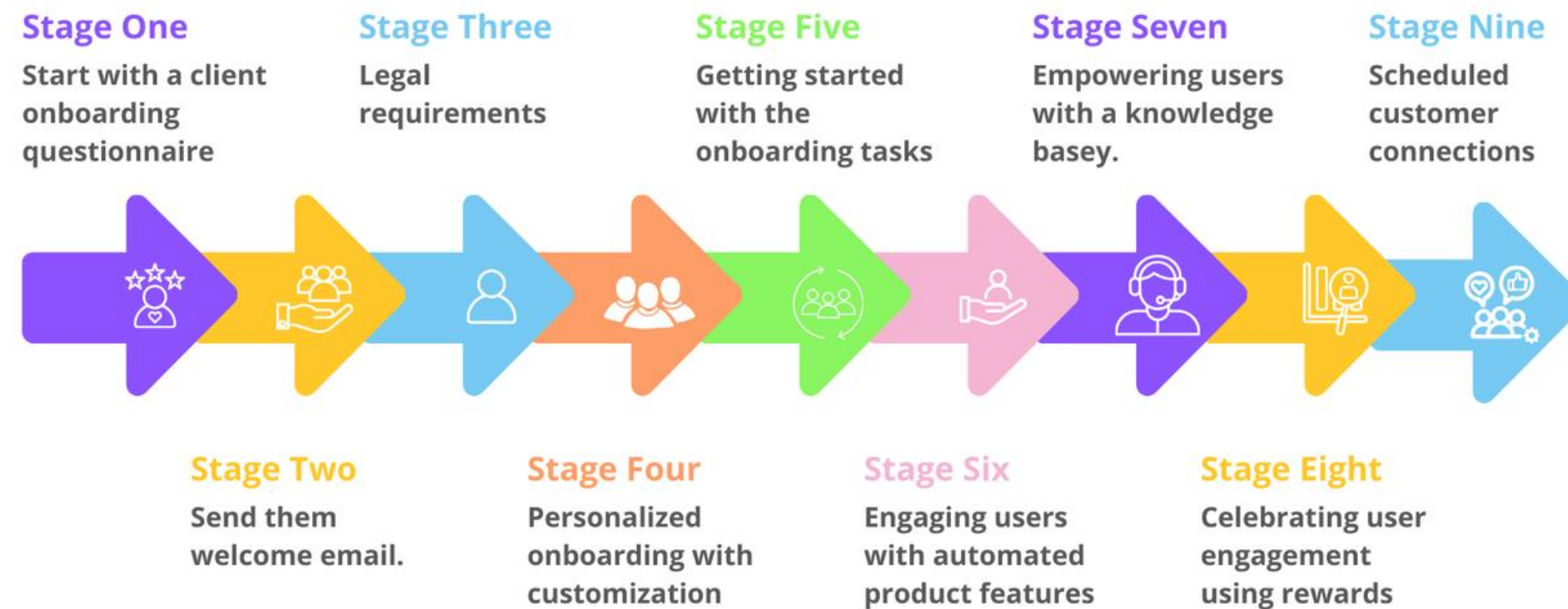
Companies that excel at  
onboarding see up to 30%  
higher customer lifetime value



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Example Lead Nurture Sequence

## 9 Step Client Onboarding Flow



[www.cflowapps.com](http://www.cflowapps.com)

 **SkillMammoth**

Get a copy of this presentation and freebies at [skillmammoth.com/simple](http://skillmammoth.com/simple)



## Customer Onboarding

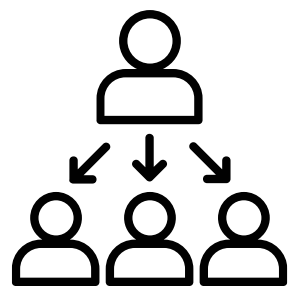
Maria used to wing every new client onboarding. It worked... until she forgot to collect final payment before starting a project.

Now, she has a Notion-based onboarding checklist with key steps like: "Send contract," "Request branding files," and "Kick-off call booked." She also wrote a welcome email template.

Everything's documented. Nothing slips through the cracks.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



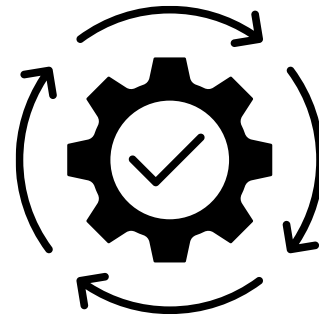
## Customer Onboarding Delegation Example

Sean wrote out his onboarding steps, then trained his VA to run the process. Now, when a client signs a proposal, the VA sends a branded welcome packet, gathers logos/files, and updates the Trello board.

Sean just gets a notification when it's time to show up for the kick-off call. The rest? Off his plate.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)



## Customer Onboarding

Jada connected her proposal software, CRM, and email tool using Make.com. Now, when a client signs up:

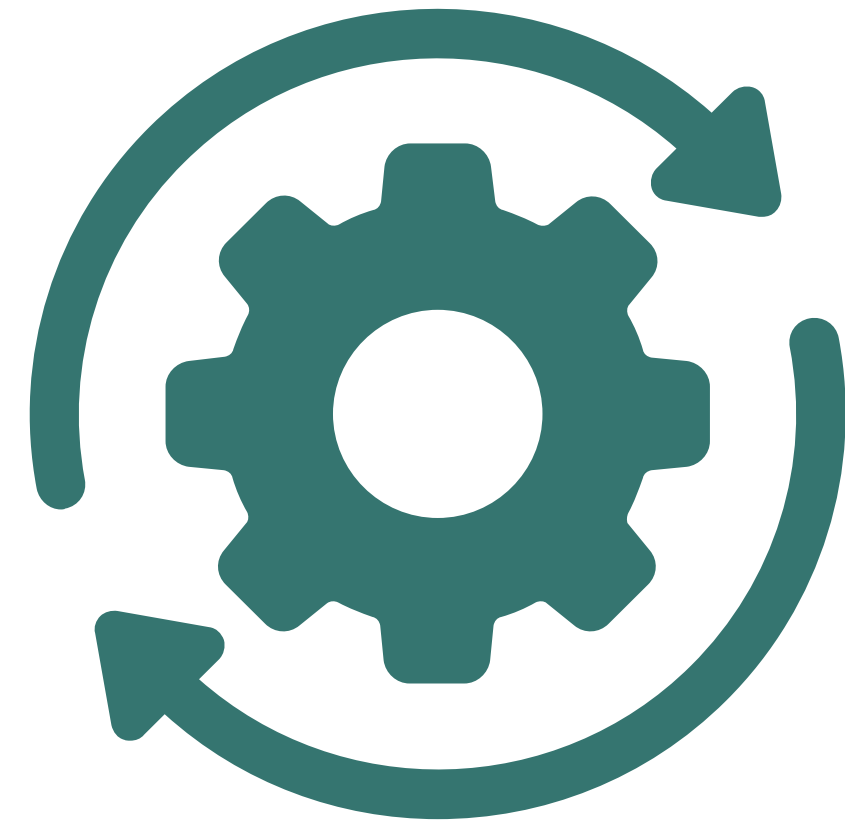
- They get a welcome email instantly
- A Google Drive folder is created for them
- A Typeform is sent to collect their intake info
- She's notified when they're ready for the kickoff call

Her onboarding now runs itself—and makes her look like she has a full team behind her.



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

Here's some  
examples of full  
systems

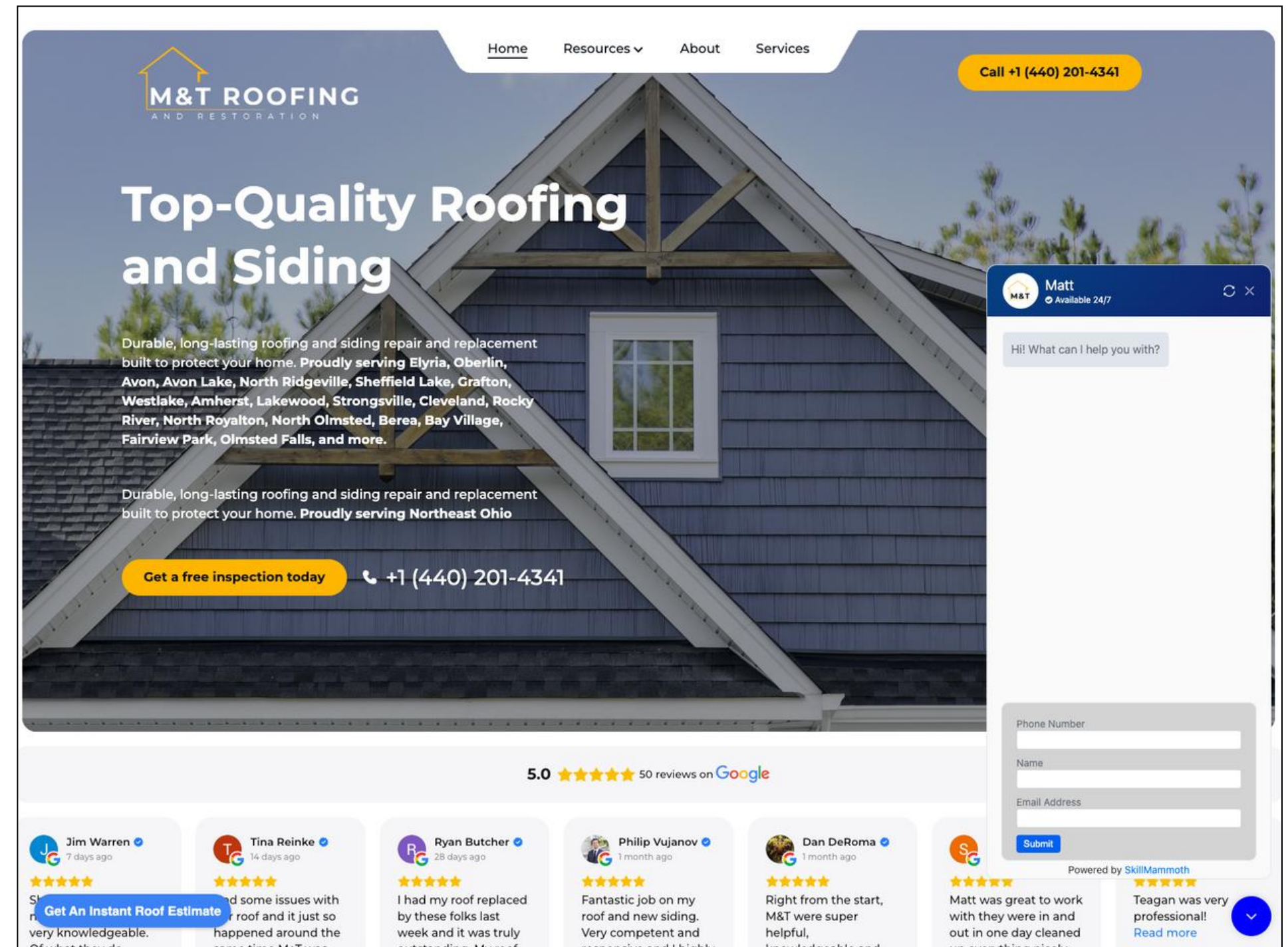


Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Case Study 1

We built M&T Roofing a smart website that works harder than most salespeople:

- Built-in quote generator
- Instant lead-nurture text and email sequence
- AI chatbot that answers questions and collects leads
- Automated project and blog posting systems that update from form submissions



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

## M&T Project Page Generator

Use this to instantly create a web page on your projects website.

What type of project did you do? \*

- Roof Repair
- Roof Replacement
- Siding Replacement
- Siding Repair
- Other

What city did you do the job in? \*

Any other specifics about the project? \*

(Doesn't have to be super detailed. The generator will use what you put here and write a short blog post about this project.)

Next

### Now let's get some pictures!

Upload the photo you want to be the central thumbnail \*

Drag & drop a file or [browse](#)

Now give us a secondary photo. Either a different angle or a close-up. \*

Drag & drop a file or [browse](#)

Now add a third photo if you have one. (Optional)

Drag & drop a file or [browse](#)

Do you want to publish it today, or save it as a draft? \*

- Publish
- Draft

Generate

# Warm & Welcoming Roof Upgrade in Oberlin

This Oberlin home got a cozy upgrade with Shakedown GAF HDZ shingles—blending beautifully with its neutral exterior for lasting curb appeal.

**Category:**

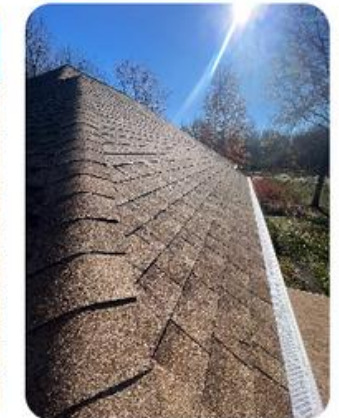
Roof Replacement

**Location:**

Oberlin, OH

**Date:**

March 22, 2025



This lovely two-story home in **Oberlin, Ohio** recently received a stunning new roof with **GAF Timberline HDZ shingles in Shakedown**. The warm, earthy tones of Shakedown were the perfect match for the home's soft beige siding and white trim—creating a seamless, natural look that feels right at home with the wooded surroundings.

Beyond the aesthetic boost, these HDZ shingles are engineered for performance. With **LayerLock™**

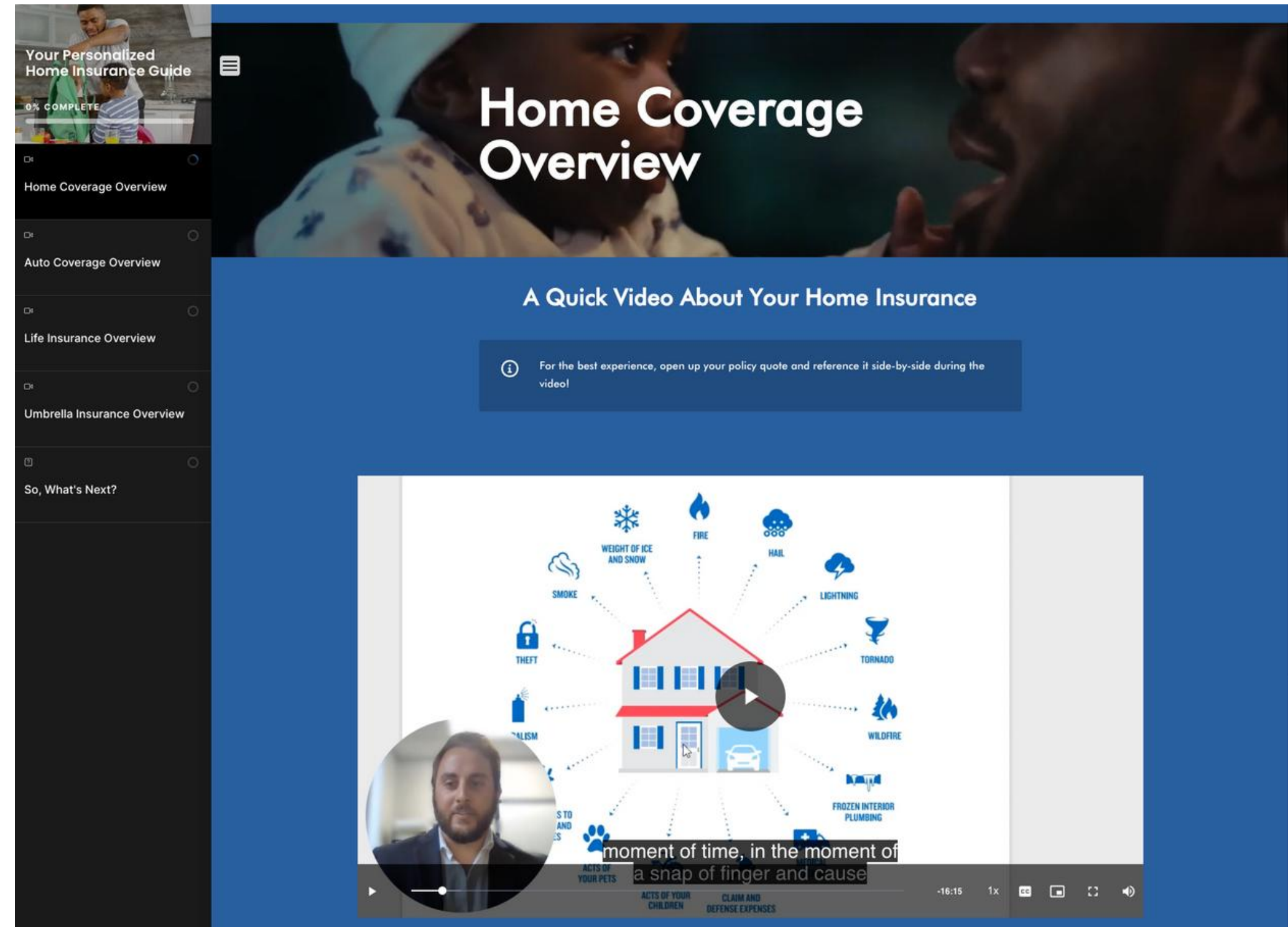


Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Case Study 2

We built a **Client Onboarding Flow** for Paul and his American Family Insurance team

- New customer signs a policy
- They get an intro email + link to interactive policy walkthrough
- **Strategically placed upgrade nudges** during the explanation
- Gets ahead of FAQs while also giving premium experience

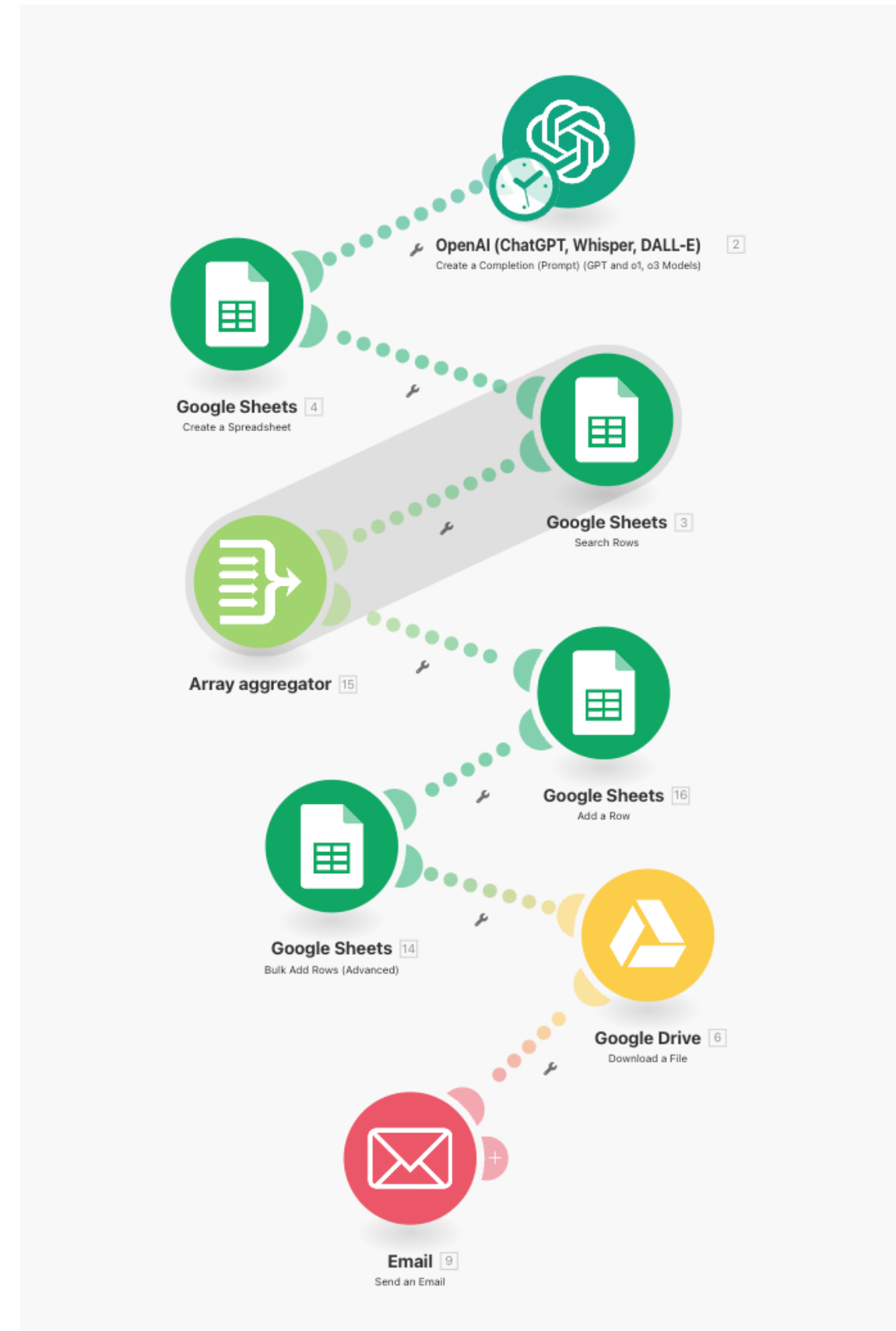


Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Case Study 3

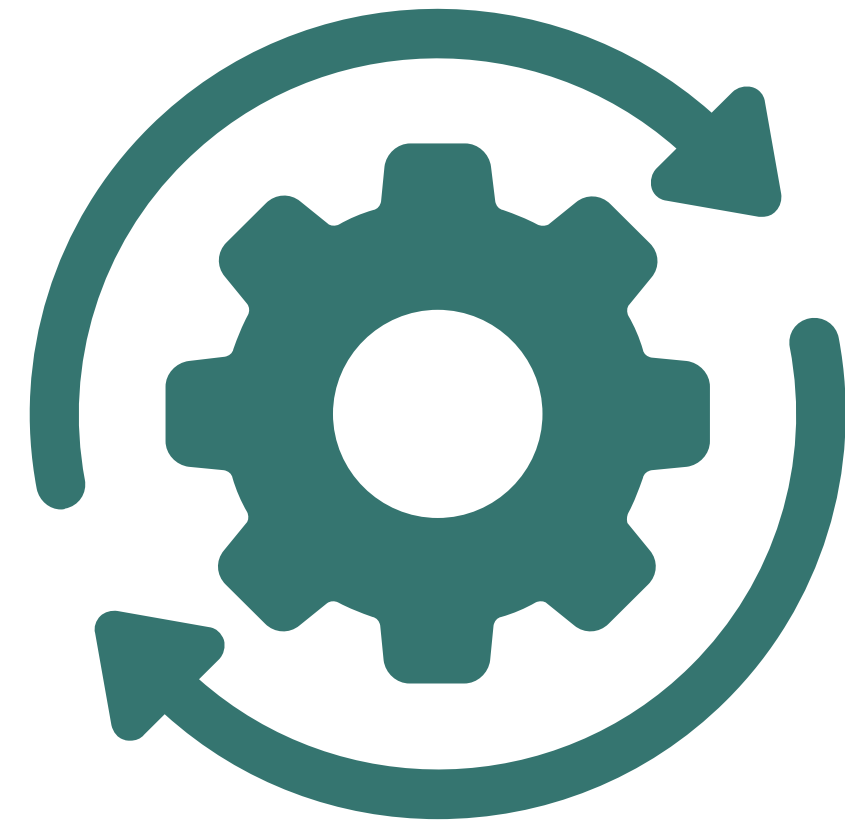
We scraped public records of 12,000+ home sales in MN:

- Names, phone numbers, close dates
- Leads delivered to Paul's team monthly
- Now his reps have a fresh, relevant, local lead list



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

What questions  
do you have for  
me?



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Rapid Fire Case Studies

- Automated an employee handbook process for a law firm, saving 3000+ hours in labor annually
- Built a strategy engine for a staffing agency to automatically calculate expected commission versus current cost for the placement.
- Built a custom booking, scheduling, and routing system, that saved a lawn care company 10 hours a week in admin + drive time + client comm time
- **Many more! (Ask)**



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)

# Q&A + Free Resources + How to Stay in Touch

- Reach out at [alex@skillmammoth.com](mailto:alex@skillmammoth.com)
- Connect on LinkedIn [search Alex Storey](#)
- Sign-Up for the Herd newsletter  
[subscribepage.io/SZxnvV](https://subscribepage.io/SZxnvV)



Get a copy of this presentation and freebies at [skillmammoth.com/simple](https://skillmammoth.com/simple)