A founder and customer review copy for evaluating the Automation Launch Kit before promotion. It presents the completed toolkit contents but is not the customer-delivery file.

YOUR GRACE AGENCY

AUTOMATION LAUNCH KIT

V1.0 FOUNDER + CUSTOMER REVIEW PREVIEW

REVIEW COPY - NOT THE CUSTOMER DELIVERY ZIP

- The fulfillment ZIP is the editable customer-delivery bundle; this is its paginated review companion.
- Buyers choose, configure, and connect their own tools, accounts, permissions, and credentials.
- Buyers build, test, activate, and maintain their own automations from these tool-agnostic templates.
- This is planning guidance and implementation structure - not done-for-you integration work.

AUTOMATE. DELIVER. EMPOWER.

Premium assets for builders who move fast.

AUTOMATION LAUNCH KIT V1.0 REVIEW COPY

Preview contents

01 **Start here**
Scope, launch path, tool-agnostic operating rules

02 **Benchmark worksheet**
Baseline, target, owner, and observed result

03 **Workflow templates**
Lead intake, onboarding, content, support, invoice follow-up

04 **Prompt pack review**
25 prompts with intended use and QA checks

05 **Setup checklist**
Pre-build, build, testing, launch, and first-month checks

06 **7-day rollout**
A staged test-to-live implementation plan

07 **License and manifest**
Usage boundaries and the delivered file inventory

README OVERVIEW

Start here

Implementation boundary: this preview and the fulfillment ZIP are tool-agnostic guides. Each buyer is responsible for selecting compatible platforms and configuring their own accounts, permissions, connections, credentials, field mapping, automations, testing, and ongoing maintenance. No accounts, integrations, or automations are created for the buyer.

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / 01 OF 11

AUTOMATE. DELIVER. EMPOWER.

A clear system for choosing, shaping, and safely launching one repeatable workflow.

Version 1.0 Your Grace Agency $19 digital toolkit

Automate. Deliver. Empower.

Premium working assets for creators, freelancers, and small teams who need a clear first automation-not a pile of vague ideas.

WHAT THIS KIT IS

This is a tool-agnostic planning and implementation kit. It gives you five ready-to-customize workflow blueprints, 25 copy-ready AI prompts, a build checklist, and a seven-day rollout plan.

It is not a collection of pre-connected integrations, an AI agent, or a promise that every tool will work together without configuration. You choose the automation platform and the apps you already use, then translate the included steps into your platform’s actions and conditions.

START HERE

LAUNCH SEQUENCE

Choose one repeatable process, build it in a safe test environment, then earn the right to launch it with evidence. This bundle supplies the planning structure; you configure the tools, connections, and permissions that fit your business.

1. Read 03-setup/automation-launch-checklist.md and choose one workflow only.
2. Open the matching file in 01-workflow-templates/ and copy its fields into a working document or your automation platform.
3. Use the prompts in 02-prompt-pack/copy-ready-prompts.md to define messages, classification rules, and test cases.
4. Follow 04-usage/7-day-rollout-guide.md to build with a test workspace before turning anything on.
5. Review 05-license/license-and-usage-terms.md before sharing anything outside your business.

INCLUDED WORKFLOWS

Workflow	Best for	Trigger	First useful outcome
Lead Intake & Qualification	freelancers, service providers	new inquiry	a routed, prioritized lead record with a drafted reply
Client Onboarding	client-service teams	signed agreement / paid invoice	an owner-assigned onboarding workspace and next-step brief
Content Brief to Production	creators, content teams	approved idea	a structured brief, task list, and review-ready draft plan
Support & Feedback Triage	small SaaS, communities, productized services	new request	categorized tickets with clear owners and safe response drafts
Invoice Follow-Up & Payment Visibility	freelancers, studios	invoice status change	timely, human-reviewed payment follow-up and a cash-flow view

CHOICE RULE

Start with the workflow that is frequent, clear, and low-risk-not necessarily the most complicated or most valuable-looking process.

A 20-MINUTE LAUNCH PATH

Minute 0-5 - choose the repeat. Pick the workflow that happens at least twice a month and has one clear starting signal. Do not begin with your messiest process.

Minute 5-10 - define the minimum record. List the inputs you must capture, the destination where the record belongs, and the one person accountable for the result.

Minute 10-15 - map the happy path. Use the template’s numbered steps. Keep the first version to one trigger, one routing decision, and one destination.

Minute 15-20 - design the safety net. Add a test label, duplicate check, owner notification, and manual-review path for low-confidence or high-impact items.

TOOL-AGNOSTIC TRANSLATION GUIDE

Template language	In your platform this may be called
Trigger	event, webhook, new record, scheduled run
Search / dedupe	find record, lookup, query, filter
Condition	filter, branch, path, if/else
Create / update	action, create record, upsert, write row
Notify	send message, post comment, create task
Review queue	table, view, board, folder, label, inbox

Choose a platform that can connect to your current source and destination apps. If it cannot, run the workflow manually with the same fields until a suitable connector or export path is available.

OPERATING RULES

- Build one workflow at a time; a small working automation is more valuable than five unfinished ones.
- Use test data and a test destination first. Never send a live client message from the first run.
- Keep a human approval step for pricing, contracts, refunds, legal matters, sensitive data, and anything published under your name.
- Store only the fields you need. Avoid placing passwords, card details, government IDs, or confidential client files in prompts or unsecured tables.
- Name each automation with the pattern: YGA | [workflow] | [stage] | v1 so it can be found, owned, and improved.

BRAND APPLICATION NOTES

If you adapt these files into a client-facing workspace or PDF, keep the visual system aligned with Your Grace Agency: deep ink #0F1225, pearl #F5F6FA, violet #7C4DFF, lavender #B388FF, and gold #D4AF37. Use Cinzel for display headings and JetBrains Mono for labels, fields, and system details. Favor generous dark-space layouts, violet-to-gold accent lines, precise labels, and outcome-led copy over generic "AI magic" language.

EXPECTED OUTCOMES AFTER WEEK ONE

- One workflow has a documented owner, trigger, source of truth, and recovery path.
- At least 10 test records have passed through without lost data or duplicate actions.
- The automation has a measurable baseline such as response time, handoff time, or manual minutes saved.
- You have a simple decision: keep, adjust, or pause based on real evidence.

YOUR GRACE AGENCY AUTOMATE. DELIVER. EMPOWER. START HERE / 01

SUPPORT BOUNDARY

This kit provides templates and planning guidance only. It does not include platform accounts, custom integration work, legal advice, or ongoing implementation support. See the license for permitted use and support terms.

FILE MAP

```
automation-launch-kit-v1.0/
README.md
01-workflow-templates/
01-lead-intake-and-qualification.md
02-client-onboarding.md
03-content-brief-to-production.md
```

- 04-support-and-feedback-triage.md
- 05-invoice-follow-up-and-payment-visibility.md
- 02-prompt-pack/copy-ready-prompts.md
- 03-setup/automation-launch-checklist.md
- 04-usage/7-day-rollout-guide.md
- 05-license/license-and-usage-terms.md
- DELIVERY-MANIFEST.md

MEASURE ONE WORKFLOW BEFORE AND AFTER LAUNCH

Benchmark worksheet

Use this preview-only worksheet alongside the 7-day rollout. Choose one metric that reveals whether the workflow is helping, record the baseline before testing, set a realistic target, name one accountable owner, and log the result after a live review period.

Example: a lead-intake workflow reduces the time to prepare a first response while keeping a human approval step before anything is sent.

Metric	Baseline	Target	Owner	Result
First-response prep time	6 hr	< 2 hr	Founder	Week 1: 1 hr 50 min
Your metric	Before	Goal	Named owner	After review
Your metric	Before	Goal	Named owner	After review

REVIEW RHYTHM

Before launch: capture 5-10 representative records. During testing: log exceptions, duplicate actions, and manual-review decisions. After one week: compare the observed result with the target, then keep, adjust, or pause the workflow based on evidence.

Measurement note: saved time is useful only when quality, approval, and data-handling safeguards are still intact.

WORKFLOW TEMPLATE

LEAD INTAKE

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / WORKFLOW 01 OF 05

AUTOMATE. DELIVER. EMPOWER.

Map the signal. Preserve the judgment. Make the next action obvious.

Outcome: Every qualified inquiry becomes a single, owned lead record with a useful next step-without losing context in an inbox.

USE WHEN

You receive inquiries through a contact form, booking tool, direct message export, or shared inbox and need a consistent way to prioritize and respond.

WORKFLOW CONTROL CARD

System detail	v1 decision
Primary signal	a new inquiry reaches your chosen intake channel
Automation role	capture, deduplicate, route, and draft
Human boundary	approve outreach, pricing, scope, and fit decisions
Safe launch mode	test records and a non-live destination first

APPROVAL BOUNDARY

This workflow prepares context and a possible next step. A human decides whether to accept the lead or send any external message.

INPUTS

Required field	Example
Lead name	Maya Rivera
Email or contact method	maya@northstar.co
Service / offer requested	Launch strategy sprint
Project need	"We need a clear launch sequence by September."
Budget or range, if supplied	$2,000-$4,000
Source	website contact form
Consent / contact preference	email permitted

TRIGGER

A new inquiry is submitted or received in your chosen intake source.

WORKFLOW STEPS

1. Capture the raw inquiry in a lead table or CRM. Preserve the original message in a source_message field.
2. Normalize name, email, source, requested service, and date. Do not overwrite the raw message.
3. Deduplicate by email or contact handle. If a matching active lead exists, append a note and notify its current owner instead of creating a second lead.
4. Classify fit as priority, standard, nurture, or manual review using your explicit criteria below.
5. Route the lead to an owner and create one next action with a due date.
6. Draft-not send-a reply that mirrors the inquiry, states the next step, and asks only for the missing decision-critical detail.
7. Notify the owner with the lead link, classification, and why it was chosen.

QUALIFICATION CRITERIA

Class	Rule	Action
Priority	clear need, matched offer, real deadline, and budget/authority signal	owner reviews within one business day
Standard	matched need but missing budget, scope, or timing	send owner-approved discovery reply
Nurture	useful future fit but no active timing	add a follow-up date; do not pressure
Manual review	sensitive, unclear, spam-like, or outside policy	do not auto-reply; route to owner

OUTPUTS

- One deduplicated lead record
- One visible owner and next action
- A classification reason stored as plain text
- A reply draft awaiting human approval
- A simple source-performance view by channel

TOOL-AGNOSTIC SETUP NOTES

- Create a lead table with lead_id, status, owner, source, fit, fit_reason, next_action, and last_contacted_at.
- Use a unique key such as a lowercased email. For contact forms with no email, use a manually reviewed key; never guess identity.
- Keep reply sending as a separate, approval-required action until at least 10 clean test runs pass.

- If an AI step classifies fit, require it to return only one of the allowed labels and a short evidence-based reason. Anything else routes to manual review.

COMPLETED EXAMPLE

Trigger: Maya submits a website form asking for a September launch strategy sprint.

Decision: priority because the requested offer matches, the deadline is explicit, and the supplied range is within the published starting range.

Output: Lead LD-2026-091 is assigned to Grace; a task "Review discovery notes by Tuesday 11:00" is created; the draft asks for team size and the launch date.

EDGE CASES

- Same person submits twice: attach the newer message to the existing open lead and post a notification; do not restart the sequence.
- No budget mentioned: use standard, not nurture, if need and timing are clear.
- A competitor or vendor asks for a meeting: route to manual review; do not use a sales template.
- Spam / suspicious links: tag as manual review, do not pass the content into an AI prompt, and never auto-reply.

QA CHECKS BEFORE LAUNCH

- [ ] Two submissions from the same email create one lead, not two.
- [ ] Missing required fields land in a review queue rather than failing silently.
- [ ] Every classification includes a human-readable reason.
- [ ] No reply is sent without the chosen approval step.
- [ ] Owner notification includes a direct link to the source record.

EXPECTED OUTCOME

Within one week, you can see every new lead, its source, owner, decision status, and next action without manually retyping the inquiry.

YOUR GRACE AGENCY WORKFLOW 01 / LEAD INTAKE HUMAN REVIEW REQUIRED FOR OUTREACH

WORKFLOW TEMPLATE

CLIENT ONBOARDING

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / WORKFLOW 02 OF 05

AUTOMATE. DELIVER. EMPOWER.

Turn a confirmed engagement into a visible, owner-led first step.

Outcome: A newly confirmed client receives a clear, repeatable welcome path while your team gets a complete internal handoff.

USE WHEN

You begin client work after a signed agreement, approved proposal, paid deposit, or another explicit confirmation event.

WORKFLOW CONTROL CARD

System detail	v1 decision
Primary signal	agreement or payment status meets your defined confirmation rule
Automation role	create the workspace, assign an owner, and prepare next steps
Human boundary	confirm scope, access requests, and client-facing communication
Safe launch mode	test records and a sample client workspace first

APPROVAL BOUNDARY

This workflow prepares the handoff. A human confirms scope, permissions, and every client-facing message.

INPUTS

Required field	Example
Client / company name	Northstar Studio
Primary contact	Maya Rivera maya@northstar.co
Confirmed service	Launch strategy sprint
Start date	September 8
Scope source	signed proposal link
Account owner	Grace
Access needs	shared folder + kickoff booking link

TRIGGER

A deal moves to confirmed only after your defined commercial checkpoint is complete.

WORKFLOW STEPS

1. Verify that client name, primary contact, confirmed service, start date, and scope link are present. Missing data goes to onboarding review.
2. Create a client workspace from a reusable template: project record, task list, and shared folder structure.
3. Copy only the confirmed scope and dates into the workspace. Do not copy internal pricing notes, negotiation history, or private payment details.
4. Assign the account owner and any delivery collaborators; create tasks for the kickoff, intake form review, and first milestone.
5. Prepare a welcome email/message draft with the kickoff link, intake request, and what happens next. Require owner approval before sending.
6. Notify the delivery team with a one-page handoff: who the client is, what was sold, success criteria, boundaries, and first due date.
7. Set a 48-hour check task to confirm the client has access and knows the next action.

OUTPUTS

- Project/workspace created from a known template
- Owner, scope, date, and success criterion visible in one place
- Draft welcome message and internal handoff
- A 48-hour access check task

TOOL-AGNOSTIC SETUP NOTES

- Keep a manual "confirmed" checkpoint instead of triggering from a casual verbal yes.
- Maintain a single project-template source. Changes to the template should be versioned so old projects are not changed unexpectedly.
- Use an access checklist rather than auto-inviting every collaborator; some clients require specific permissions or domains.
- If your platform cannot create folders, create a task titled Create client folder with the template path rather than pretending the folder exists.

COMPLETED EXAMPLE

Trigger: Northstar Studio pays the deposit and the owner sets the deal to confirmed.

Actions: The workflow creates Northstar - Launch Sprint, adds an intake task due September 2, assigns Grace, and drafts a welcome note.

Check: The 48-hour task confirms Maya received the intake link and can access the shared folder.

EDGE CASES

- Deposit paid but contract not signed: do not trigger onboarding; create a review task instead.
- Start date is within 48 hours: flag as urgent and notify the owner; do not assume standard lead time.
- Multiple stakeholders: use one primary contact and list other stakeholders as collaborators, with their role and permissions.
- Client pauses before kickoff: set workspace status to on hold; do not delete records or send the normal welcome sequence.

QA CHECKS BEFORE LAUNCH

- [ ] The trigger excludes unconfirmed or refunded deals.
- [ ] A missing scope link blocks automatic workspace creation.
- [ ] Duplicate events do not create duplicate projects.
- [ ] The welcome message is drafted, not automatically sent.
- [ ] Internal handoff omits sensitive payment and negotiation data.

EXPECTED OUTCOME

Every confirmed client has the same first-day clarity: access, owner, scope, kickoff path, and next action.

YOUR GRACE AGENCY WORKFLOW 02 / CLIENT ONBOARDING HUMAN REVIEW REQUIRED FOR CLIENT COMMUNICATION

WORKFLOW TEMPLATE

CONTENT PRODUCTION

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / WORKFLOW 03 OF 05

AUTOMATE. DELIVER. EMPOWER.

Make approved ideas easier to produce without automating editorial judgment.

Outcome: Approved ideas become production-ready briefs and assigned tasks without recreating context in every tool.

USE WHEN

You publish newsletters, social posts, video, podcasts, articles, or launch content and want a consistent bridge between an approved idea and production.

WORKFLOW CONTROL CARD

System detail	v1 decision
Primary signal	an idea is marked approved in your planning system
Automation role	structure the brief, create tasks, and prepare a draft plan
Human boundary	approve claims, sources, voice, and final publishing
Safe launch mode	use internal drafts and a non-public review destination

APPROVAL BOUNDARY

This workflow organizes production work. A human verifies evidence and approves all public-facing copy before it is published.

INPUTS

Required field	Example
Idea title	"Five ways a freelancer can stop chasing leads"
Audience	solo service providers
Channel	LinkedIn carousel + newsletter
Desired action	book a workflow audit
Source / proof	client pattern, internal notes, cited research
Owner	Grace
Target publish date	August 20

TRIGGER

An idea is marked approved for production by the responsible editor or owner.

WORKFLOW STEPS

1. Validate that the audience, channel, desired action, owner, and publish date are set.
2. Create a content brief using the fields in this template: promise, angle, proof, key points, CTA, required assets, and review criteria.
3. Generate a draft outline with an AI prompt or a manual outline. Label it draft; do not publish it automatically.
4. Create production tasks appropriate to the channel: writing, design, review, scheduling, and performance check.
5. Assign one accountable owner to each task and set due dates backward from the publish date.
6. Notify the owner with the brief link and any missing source/proof item.
7. Log final URL or asset location after publishing so future performance can be reviewed.

OUTPUTS

- One consistent, channel-specific brief
- An outline that can be reviewed and improved
- A dated task sequence with owners
- A final asset/URL field ready for reporting

TOOL-AGNOSTIC SETUP NOTES

- Treat approval as a human decision. Do not auto-promote raw ideas based on likes or keywords.
- Use a controlled list for channels to prevent task-template mismatches.
- Include a proof_status field: verified, needs source, or opinion. Anything not verified cannot present a factual claim as certain.
- Do not let an AI output invent testimonials, metrics, customer names, or citations. Add a review rule that removes unsupported claims.

COMPLETED EXAMPLE

Trigger: Grace approves an idea for a LinkedIn carousel and newsletter.

Output: A brief is created with the CTA "Book a workflow audit," a seven-slide outline is drafted, writing and design tasks are assigned, and the proof field is marked opinion + internal experience rather than external research.

EDGE CASES

- Idea has no CTA: create the brief but block scheduling until the owner chooses one.

- Publish date is in the past: send a deadline review notification; do not calculate negative due dates.
- Same idea for two channels: make one parent brief and separate channel task groups; avoid duplicate source notes.
- AI output makes a specific performance claim: flag for source review and remove it until verified.

QA CHECKS BEFORE LAUNCH

- [ ] Only approved ideas trigger production.
- [ ] Every task has one accountable owner and a due date.
- [ ] The output stores the original idea and the final brief separately.
- [ ] AI drafts are visibly labeled and cannot be scheduled automatically.
- [ ] Required proof is checked before the content reaches publish status.

EXPECTED OUTCOME

Your team can move from "we should post this" to a brief, task plan, and reviewable draft without losing the reason the content matters.

YOUR GRACE AGENCY WORKFLOW 03 / CONTENT PRODUCTION HUMAN REVIEW REQUIRED BEFORE PUBLISHING

WORKFLOW TEMPLATE

SUPPORT & FEEDBACK

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / WORKFLOW 04 OF 05

AUTOMATE. DELIVER. EMPOWER.

Create a calm, traceable path from incoming message to accountable response.

Outcome: Requests arrive in one reviewable queue with the right priority, owner, and response path-without making an AI system the final decision-maker.

USE WHEN

You receive support questions, bug reports, feature requests, or client feedback through a form, inbox, community, or help desk.

WORKFLOW CONTROL CARD

System detail	v1 decision
Primary signal	a new request enters a monitored support channel
Automation role	capture, categorize, prioritize, and draft safely
Human boundary	verify identity, decide remedies, and approve responses
Safe launch mode	route uncertain or high-impact requests to manual review

APPROVAL BOUNDARY

This workflow prioritizes and prepares information. A human verifies identity, decides remedies, and approves every sensitive response.

INPUTS

Required field	Example
Requester	Jordan Lee
Contact method	jordan@example.com
Message	"The download link says expired."
Source	support form
Product / service	Automation Launch Kit
Attachment / evidence	screenshot link, if supplied
Received at	timestamp

TRIGGER

A new support request or feedback item arrives in a connected source.

WORKFLOW STEPS

1. Capture the original message, source, and timestamp in a support queue.
2. Check duplicates using requester + similar open subject. Link related requests; do not close either automatically.
3. Classify into access, billing, bug, how-to, feature request, feedback, sensitive, or manual review.
4. Set priority using explicit rules: service blocked, security/privacy concern, paid access issue, standard question, or suggestion.
5. Route to the correct owner with a response target. Sensitive issues must go to a designated human, not an automated response.
6. Draft a response from an approved knowledge source only. Mark it for review if the answer depends on account status, a refund, a promise, or an unknown technical cause.
7. Close the loop: when resolved, record the resolution type and tag any repeat issue for process improvement.

PRIORITY RULES

Priority	Example	Response path
Urgent	suspected account compromise, privacy request, widespread access outage	immediate human escalation
High	paid customer cannot access purchased file	owner review within one business day
Standard	how-to question with documented answer	draft response + normal queue
Low	feature request or general praise	acknowledge and log for review

OUTPUTS

- One categorized ticket with source message preserved
- Clear owner, priority, and response target
- A reviewed response path rather than an unsupported answer
- Trend tags for recurring issues

TOOL-AGNOSTIC SETUP NOTES

- Keep classification labels finite. Free-form labels make reporting useless.
- Always preserve the original message and attachment link, even if an AI summary is added.
- Do not send automatic messages about security, privacy, refunds, billing disputes, or account access; route those to a human.
- Use a confidence rule: if the classifier cannot cite words from the original request supporting its label, send to manual review.

COMPLETED EXAMPLE

Trigger: Jordan reports an expired download link.

Decision: access, high priority because a paid product is unavailable.

Output: The ticket is assigned to the owner with a one-business-day target; a draft asks Jordan to confirm the checkout email without exposing account data in public.

EDGE CASES

- One message contains a feature request and a bug: make a primary ticket for the service-blocking item and link a feature-request record.
- Angry or abusive message: classify the issue separately from tone; apply your conduct policy and keep a human in control.
- Customer sends sensitive data: restrict access, do not repeat the data in notifications or prompts, and follow your privacy process.
- Unknown product name: route to manual review rather than guessing a policy.

QA CHECKS BEFORE LAUNCH

- [ ] Duplicate detection links rather than deletes tickets.
- [ ] Sensitive and urgent categories cannot auto-send a reply.
- [ ] Every category maps to an owner or a visible review queue.
- [ ] Response drafts cite an approved knowledge-base field or are marked "needs review."
- [ ] Resolution data can be filtered by product and issue type.

EXPECTED OUTCOME

You can answer routine requests faster while maintaining a safe, accountable path for issues that require judgment.

YOUR GRACE AGENCY WORKFLOW 04 / SUPPORT + FEEDBACK HUMAN REVIEW REQUIRED FOR REMEDIES

WORKFLOW TEMPLATE

INVOICE FOLLOW-UP

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / WORKFLOW 05 OF 05

AUTOMATE. DELIVER. EMPOWER.

Make payment status visible while keeping money conversations human-led.

Outcome: You can see invoice status and follow up consistently without auto-sending payment pressure or making financial decisions from incomplete data.

USE WHEN

You invoice clients for services and need a simple, reliable reminder and visibility process.

WORKFLOW CONTROL CARD

System detail	v1 decision
Primary signal	an invoice changes status or reaches a review date
Automation role	update visibility, flag exceptions, and prepare a draft
Human boundary	approve reminders, disputes, terms, and collection actions
Safe launch mode	test with sample invoices and an internal-only notification

APPROVAL BOUNDARY

This workflow makes payment status visible and can prepare a draft. A human approves every reminder, dispute response, or collection action.

INPUTS

Required field	Example
Invoice ID	INV-1042
Client name	Northstar Studio
Amount	$1,200
Issue date	August 1
Due date	August 15
Status	sent / viewed / paid / overdue / disputed
Account owner	Grace

TRIGGER

An invoice is created, its status changes, or a scheduled date check finds it approaching/past its due date.

WORKFLOW STEPS

1. Record the invoice status in a finance visibility table with a link to the authoritative invoice system.
2. Calculate a follow-up stage from due date and status: upcoming, due today, 1-3 days overdue, 4-7 days overdue, manual review.
3. Exclude invoices marked paid, disputed, refunded, canceled, or on an agreed payment plan from standard reminders.
4. Draft a concise follow-up message appropriate to the stage. Require account-owner approval before sending.
5. Create a follow-up task with a date and owner, then log the message outcome after it is sent.
6. Escalate to manual review for partial payments, disputes, very large balances, or a client with a documented exception.
7. Report weekly on total open invoices, next follow-up date, and the oldest outstanding balance.

OUTPUTS

- A current invoice-status view linked to the source system
- A human-reviewed reminder draft and next action
- Exclusions for disputes and special arrangements
- Weekly cash-visibility summary

TOOL-AGNOSTIC SETUP NOTES

- Treat your invoicing tool as the source of truth; do not update financial status only in a spreadsheet.
- Use local timezone and business-day rules for due dates. A scheduled run should not send a "past due" reminder at 12:01 a.m.
- Never include bank details, full account numbers, or payment links from unverified text fields in automated drafts.
- Start by drafting reminders. Move to automatic sending only if your policies, platform permissions, and test results support it.

COMPLETED EXAMPLE

Trigger: INV-1042 is still unpaid one business day after August 15.

Decision: stage 1-3 days overdue; account is not disputed and has no payment plan.

Output: A polite reminder draft is created for Grace to review, and a follow-up task is due August 18. The record links back to the invoice system.

EDGE CASES

- Partial payment: route to manual review; the normal balance template may be wrong.
- Client says payment is processing: record the note and set a new follow-up date; do not keep sending the sequence.
- Invoice has a dispute flag: stop the standard reminder path and notify the owner.
- Duplicate invoice events: update the existing follow-up record using invoice ID; do not create repeated reminders.

QA CHECKS BEFORE LAUNCH

- [ ] Paid and disputed invoices are excluded from standard reminders.
- [ ] Follow-up stages calculate correctly across weekends and your timezone.
- [ ] Every reminder remains a draft pending approval in v1.
- [ ] A repeated status event updates one invoice record.
- [ ] The weekly view matches a small sample from the source invoice system.

EXPECTED OUTCOME

You gain a respectful, repeatable follow-up rhythm and a clearer view of what needs attention-without automating sensitive financial judgment.

YOUR GRACE AGENCY WORKFLOW 05 / INVOICE FOLLOW-UP HUMAN REVIEW REQUIRED FOR PAYMENT COMMUNICATION

25 COPY-READY PROMPTS

Prompt pack review

This review copy shows every prompt's documented purpose, sample test, and pass condition. The editable, copy-ready instructions are delivered in the customer ZIP.

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / PROMPT PACK / 07 OF 11

AUTOMATE. DELIVER. EMPOWER.

Use AI to prepare structured work-not to replace accountable judgment.

25 practical prompts tool-agnostic version 1.0

HOW TO USE THESE PROMPTS

Use mode | What to do | Keep human

Design | adapt a prompt before it touches live data | business rules and approval criteria

Test | run at least five representative test records | evidence review and exception decisions

Launch | connect only structured, validated output | every consequential external action

PROMPT SAFETY NOTE

These prompts help you draft, classify, summarize, and document. They do not authorize a model to make financial, legal, access, security, employment, medical, or publishing decisions.

Replace every value in [brackets] before running. Paste only the minimum necessary business or client information. For work that affects an external person-messages, financial records, scope, promises, or publishing-treat the result as a draft requiring human review.

PROMPT QA STANDARD

Each prompt below has been written and desk-tested against the stated sample input for: (1) a clear output format, (2) no invented facts when evidence is missing, (3) a defined manual-review condition, and (4) a usable next action. Before connecting any prompt to a live automation, run it against five of your own test records and compare its output to the QA checks in 03-setup/automation-launch-checklist.md.

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1. WORKFLOW OPPORTUNITY SCORER

Use: choose one repeatable task worth automating.

2. TRIGGER DEFINITION

Use: turn a fuzzy process into one observable start event.

3. MINIMUM VIABLE AUTOMATION MAP

Use: reduce a workflow to a safe v1.

4. FIELD SCHEMA BUILDER

Use: define the minimum data structure before building.

5. FAILURE-PATH DESIGNER

Use: make a workflow recoverable before it fails live.

6. LEAD FIT CLASSIFIER

Use: categorize a new inquiry with a reason.

7. LEAD REPLY DRAFT

Use: make a concise, personalized reply draft.

8. SUPPORT CATEGORY AND PRIORITY

Use: triage a request into a review queue.

9. FEEDBACK THEME EXTRACTOR

Use: find repeat patterns without erasing individual context.

10. CONTENT IDEA ROUTER

Use: decide whether an idea is ready for production.

11. CLIENT ONBOARDING WELCOME DRAFT

Use: draft a human-reviewed welcome message.

12. INTERNAL DELIVERY HANDOFF

Use: turn sales context into an actionable delivery brief.

13. CONTENT BRIEF GENERATOR

Use: create a structured brief from an approved idea.

14. REPURPOSE ONE SOURCE SAFELY

Use: adapt an approved source for several channels.

15. INVOICE REMINDER DRAFT

Use: draft a respectful reminder for review.

16. TEST-RECORD GENERATOR

Use: create a useful test set before live activation.

17. AUTOMATION TEST ORACLE

Use: compare a workflow run to expected behavior.

18. AI-OUTPUT QUALITY CHECK

Use: review a draft created by any model.

19. PRIVACY MINIMIZER

Use: reduce data before sending it to an AI step or shared notification.

20. LAUNCH READINESS GATE

Use: decide whether to turn on a v1 automation.

21. SOP DRAFT FROM A WORKFLOW

Use: turn a proven flow into a repeatable operating procedure.

22. WEEKLY AUTOMATION REVIEW

Use: decide what to keep, adjust, or stop.

23. EXCEPTION PLAYBOOK

Use: turn recurring exceptions into a safe policy.

24. METRIC DEFINITION ASSISTANT

Use: choose a measurable result for one workflow.

25. HANDOFF SUMMARY FOR A HUMAN OWNER

Use: make an automation's current state legible.

PROMPT OUTPUT RULES FOR EVERY WORKFLOW

```
- Save the source record ID beside the generated output so a human can trace it.
- Require structured formats (JSON, tables, fixed headings) when an automation needs to read the result.
- If the model returns an unexpected label, empty required field, or unsupported claim, send the record to manual review.
- Never let a model approve payments, contracts, refunds, access verification, legal claims, medical guidance, hiring/termination, or security decisions.
- Archive prompt changes with a date and a short reason; prompt changes are workflow changes.
```

YOUR GRACE AGENCY PROMPT PACK / 25 COPY-READY PROMPTS REVIEW OUTPUT BEFORE ACTION

BUILD WITH SAFEGUARDS

Setup checklist

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / SETUP / 08 OF 11

AUTOMATE. DELIVER. EMPOWER.

A launch is a decision supported by test evidence-not a switch you flip.

Use this checklist from selection through limited live launch. Complete it for one workflow before starting another.

Gate	What must be true before moving on
Select	one clear trigger, owner, and outcome are named
Design	required fields, destination, and approval boundary are visible
Test	representative records prove the happy path and failure path
Launch	a limited scope, daily review, and fast rollback are ready

OPERATING RULE

If a consequential decision cannot be safely described, tested, and paused, keep that step manual.

1. CHOOSE THE WORKFLOW

- [ ] The work happens at least twice a month or causes a repeatable handoff problem.
- [ ] The workflow has one observable start event, not a vague intent.
- [ ] A named owner is accountable for reviewing exceptions and improving the process.
- [ ] The first version can avoid autonomous decisions about money, contracts, access, privacy, security, employment, health, or legal matters.
- [ ] I can state the desired outcome in one sentence: "When [trigger] happens, [owner] can reliably see or do [outcome]."
- [ ] I chose the matching template in 01-workflow-templates/.

Decision gate: If any box is unchecked, keep the process manual and document what is missing.

2. DEFINE THE OPERATING DESIGN

- [ ] I named the workflow: YGA | [workflow] | v1.
- [ ] I listed the source of truth for each input field.
- [ ] I created a simple field schema with only the information needed to route, fulfill, or measure.
- [ ] I chose the destination record where the result will be visible.
- [ ] I wrote explicit allowed labels for any classification step.

- [ ] I documented what should never trigger the workflow.
- [ ] I identified one manual-review queue and the person who monitors it.
- [ ] I wrote a rollback action: disable the trigger, label affected records, and notify the owner.

3. PROTECT THE DATA AND PEOPLE

- [ ] Test data uses fictional names and contact details.
- [ ] Passwords, API keys, payment-card data, government IDs, health details, and unnecessary private data are excluded.
- [ ] Any AI prompt receives minimized fields only; the original record remains in the source system.
- [ ] Client-facing messages are drafts until a human approves them.
- [ ] Sensitive, billing, security, privacy, refund, account-access, and dispute cases route to a human.
- [ ] Collaboration permissions were checked before creating shared folders, projects, or notifications.

4. BUILD THE MINIMUM VIABLE VERSION

- [ ] I configured one trigger, one validation, one branch, one destination action, and one owner notification.
- [ ] I added a duplicate check using the safest available unique key.
- [ ] I use a test destination or a visible TEST label.
- [ ] I made every action idempotent where possible: a second run updates or alerts rather than blindly creating a duplicate.
- [ ] I added a failure alert that includes record ID, workflow name, and failed step.
- [ ] I kept irreversible or external actions (sending, charging, deleting, publishing) manual in v1.

5. RUN THE TEST SET

Create at least 10 records with Prompt 16 or your own examples. Include the following:

Test	Required result
Standard valid record	reaches the destination with correct fields and owner
Missing required field	enters manual review; no silent failure
Duplicate event	updates/links the existing record; no second message/task
Invalid format	shows clear error or review path
Off-policy / sensitive item	reaches human review; no AI/external send
Wrong route attempt	is caught by allowed labels or validation
Delayed event	does not create an outdated or misleading action
Source unavailable	alerts owner and preserves recovery instructions

Destination unavailable | captures failure and prevents accidental repeats

Human rejection | lets the owner stop or edit the drafted output

- [ ] I compared each actual result to its expected result.
- [ ] I fixed every blocker: duplicate creation, lost data, wrong owner, external action without approval, or missing rollback.
- [ ] I reran failed tests after each change.
- [ ] I saved screenshots, run IDs, or notes for the final 10 tests.

6. LIMITED LIVE LAUNCH

- [ ] The owner approved the exact trigger and scope.
- [ ] The workflow starts with a narrow segment, label, or manually selected records.
- [ ] The owner will review outputs daily for the first seven days.
- [ ] The success metric and guardrail are recorded before launch.
- [ ] The review queue has a response target (for example, within one business day).
- [ ] The rollback action can be completed in under five minutes.
- [ ] The next review date is on the calendar.

7. FINAL SIGN-OFF

Check | Owner initials / date

Workflow purpose and scope are clear

Test evidence reviewed

Human approval boundaries are active

Failure path and rollback verified

Metric baseline recorded

Limited launch approved

WHAT "DONE" MEANS

The automation is not done because it is switched on. It is done when the owner can explain what starts it, where results go, how duplicates are handled, which actions remain human, and how to pause it safely.

YOUR GRACE AGENCY SETUP / LAUNCH CHECKLIST COMPLETE ONE WORKFLOW BEFORE STARTING ANOTHER

TEST FIRST, THEN LAUNCH

7-day rollout guide

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / ROLLOUT / 09 OF 11

AUTOMATE. DELIVER. EMPOWER.

Build deliberately. Observe closely. Let evidence decide the next iteration.

A deliberate path from one process to a trusted v1. Use this plan with one template, not the entire kit at once.

Rhythm	Focus	Proof to keep
Days 1-2	define the process and minimum record	owner, trigger, field map, baseline
Days 3-5	build and test a narrow v1	test results, exceptions, rollback notes
Days 6-7	observe limited use and decide	review log, metric comparison, next action

ROLLOUT PRINCIPLE

Limited live launch is not permission to remove safeguards. Keep the approval path, review the output daily, and pause when evidence says to pause.

BEFORE DAY 1

Choose a workflow from 01-workflow-templates/, assign an owner, and set aside 45-60 minutes each day. You need access to the workflow’s source, destination, and a safe test space. No new software purchase is required to use this guide.

DAY 1 - SELECT AND DEFINE

Goal: choose a narrow, measurable first workflow.

1. List three recurring processes using Prompt 1.
2. Choose the one with a clear trigger and manageable consequence if it pauses.
3. Complete sections 1 and 2 of the setup checklist.
4. Write a baseline: current response time, number of handoffs, manual minutes, or error count.

Deliverable: a one-sentence workflow outcome, owner, trigger, destination, and baseline.

Do not proceed if: the trigger depends on a judgment call, you have no owner, or an unsafe external action is required.

DAY 2 - BUILD THE RECORD AND SOURCE OF TRUTH

Goal: make the data clear before adding automation.

1. Use Prompt 4 to produce a small field schema.
2. Create or update the destination table, CRM view, board, or folder template.
3. Decide how a duplicate will be recognized.
4. Mark data that must not enter notifications or AI prompts.

Deliverable: one source-to-destination field map and a duplicate rule.

QA: Enter a fictional record manually and confirm every required field is visible to the owner.

DAY 3 - MAP THE HAPPY PATH

Goal: turn the template into a minimum viable sequence.

1. Translate the selected template into your platform’s trigger, search, condition, create/update, and notify actions.
2. Keep only the happy path plus one manual-review route.
3. Name the workflow and each action clearly.
4. Use a test label or test destination.

Deliverable: a switched-off or test-only v1 with no external auto-send action.

QA: Review each action against the original template. Remove any extra step that does not directly serve the outcome.

DAY 4 - ADD SAFETY AND FAILURE HANDLING

Goal: prevent quiet errors and accidental repeats.

1. Use Prompt 5 to identify failure modes.
2. Add missing-field handling, duplicate handling, and a failure notification.
3. Write the rollback steps where the owner can find them.
4. Set human approval for external communications and sensitive decisions.

Deliverable: a documented failure path and pause procedure.

QA: Disable the test destination once to confirm the owner sees a useful failure signal rather than a silent error.

DAY 5 - TEST WITH EVIDENCE

Goal: prove the workflow handles normal and awkward records.

1. Use Prompt 16 to create 10 fictional test records.
2. Run them one at a time.
3. Use Prompt 17 to compare actual to expected results.
4. Fix blockers and rerun every affected case.

Deliverable: a completed test table with notes, screenshots, or run IDs.

Launch gate: Do not launch if you see duplicate creation, lost data, a wrong owner, or an external action that can happen without intended review.

DAY 6 - LIMITED LAUNCH

Goal: process a small amount of live work under close review.

1. Turn on the trigger only for a narrow segment or manually selected records.
2. Review every output before the end of the business day.
3. Log each exception, edit, and manual intervention.
4. Pause immediately if a record reaches the wrong destination, repeats an external action, or exposes data.

Deliverable: a limited-launch log: count processed, exceptions, owner time, and customer-impact notes.

Expected outcome: You learn from real work without turning a small mistake into a broad one.

DAY 7 - REVIEW AND DECIDE

Goal: make an evidence-based next move.

1. Use Prompt 22 to summarize the first week.
2. Compare the baseline with actual outcomes; avoid claiming improvement from a tiny sample.
3. Decide keep, adjust, or pause.
4. If keeping, document the v1 as an SOP with Prompt 21 and set a 30-day review.

Deliverable: a short owner handoff using Prompt 25, plus one prioritized improvement.

DAILY REVIEW QUESTIONS

- Did every record end in the expected place with the expected owner?
- Did a duplicate, missing value, or delayed event change the result?
- Did the automation create a draft or take an action beyond the intended boundary?
- Could a teammate understand why the workflow made each decision?
- Is the workflow saving useful time without adding hidden review work?

TROUBLESHOOTING GUIDE

Signal	Likely cause	First response
No workflow run	trigger mismatch or source permission	create one test record; verify fields and connection access
Duplicate record/task	repeated event or missing lookup	pause external actions; add a search/upsert step
Wrong routing	labels too broad or missing data	tighten allowed labels; route uncertain cases to review

Empty/garbled AI output | prompt lacks fixed format or source fields | require JSON/headings; validate output before use

Client message sent too early | approval boundary was skipped | pause workflow; review logs; restore a draft-only step

Owner never sees exception | notification target/rule incorrect | test failure path with owner present

DEFINITION OF A HEALTHY V1

A healthy v1 is boring in the best way: it routes known work reliably, surfaces unknown work visibly, keeps consequential judgment human, and leaves enough evidence for the owner to improve it next month.

YOUR GRACE AGENCY ROLLOUT / 7 DAYS TEST FIRST, THEN LAUNCH

USAGE SUMMARY

License and usage terms

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / LICENSE / 10 OF 11

AUTOMATE. DELIVER. EMPOWER.

Clear permissions for a practical, tool-agnostic working bundle.

Automation Launch Kit Version 1.0 Your Grace Agency

Effective date: July 18, 2026

You may	You may not
adapt the materials for your own operations and client-service work	resell, redistribute, or publish the original files as standalone assets
use resulting workflows in your own tools	represent the kit as custom integration work or included software

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Some prompts can be used with AI services and templates can be implemented in third-party automation platforms. Those services are not included with this purchase. Review their pricing, permissions, data handling, and terms before using them. Do not place credentials, payment data, or unnecessary confidential information into an AI prompt or workflow payload.

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Your purchase includes the files delivered in version 1.0. Updates, additional templates, implementation help, and platform troubleshooting are not promised unless Your Grace Agency explicitly offers them in writing. If you need help locating a file or believe a delivered file is corrupted, contact the storefront’s listed support channel with your order details.

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FULFILLMENT INVENTORY

Delivery manifest

YOUR GRACE AGENCY / AUTOMATION LAUNCH KIT / MANIFEST / 11 OF 11

AUTOMATE. DELIVER. EMPOWER.

The release record for the editable customer-delivery bundle.

Product: Automation Launch Kit

Publisher: Your Grace Agency

Version: 1.0

Release date: July 18, 2026

Package folder: automation-launch-kit-v1.0/

Distribution archive: your-grace-agency-automation-launch-kit-v1.0.zip

Release control	Status
Bundle type	editable Markdown planning and implementation files
Delivery boundary	no accounts, integrations, credentials, or software included
Customer path	start with README.md, then complete one workflow
Review companion	founder/customer preview PDF is separate from fulfillment

FULFILLMENT NOTE

The ZIP is the customer-delivery bundle. The review preview is a paginated evaluation companion and does not replace the editable source files.

PACKAGE CONTENTS

File	Purpose
README.md	customer-facing start-here guide, tool boundary, setup path, and product map
01-workflow-templates/01-lead-intake-and-qualification.md	lead capture, routing, reply-draft, and duplicate-handling blueprint
01-workflow-templates/02-client-onboarding.md	confirmed-client onboarding and delivery-handoff blueprint
01-workflow-templates/03-content-brief-to-production.md	approved-idea to content-brief and production-task blueprint
01-workflow-templates/04-support-and-feedback-triage.md	safe support and feedback classification/routing blueprint
01-workflow-templates/05-invoice-follow-up-and-payment-visibility.md	human-reviewed invoice follow-up and visibility blueprint

02-prompt-pack/copy-ready-prompts.md | 25 copy-ready prompts grouped by workflow design, routing, drafting, QA, and improvement

03-setup/automation-launch-checklist.md | selection, design, data safety, testing, launch, and sign-off checklist

04-usage/7-day-rollout-guide.md | daily implementation plan, troubleshooting, and review guidance

05-license/license-and-usage-terms.md | license grant, permitted use, restrictions, support, and disclaimer terms

DELIVERY-MANIFEST.md | this file; package inventory and release verification record

RELEASE VERIFICATION REQUIREMENTS

- [x] Customer README present
- [x] Five workflow templates present
- [x] Prompt pack contains 25 prompts (minimum required: 20)
- [x] Setup checklist present
- [x] Seven-day rollout guide present
- [x] License and usage terms present
- [x] Manifest present
- [x] ZIP archive opens successfully and matches this inventory

COMPATIBILITY STATEMENT

These are tool-agnostic templates designed for manual implementation in the customer’s chosen workflow, project-management, CRM, help-desk, invoicing, and AI tools. The archive does not include prebuilt integrations, platform credentials, API keys, or software licenses.

VERSIONING POLICY

The first release is v1.0. Future changes follow semantic intent: v1.0.1 for corrections, v1.1 for additive content, and v2.0 for a material structural change. The version in the archive filename, root folder, and manifest must match.

YOUR GRACE AGENCY MANIFEST / RELEASE CONTROL INVENTORY MUST MATCH THE DELIVERY ZIP

Review source: completed Automation Launch Kit v1.0 files in this repository. This review PDF is not fulfillment; the matching customer ZIP contains the editable files. Brand direction: approved Your Grace Agency brand-kit board.