

AI Funnel Setup Checklist for Small Businesses

What This Checklist Does

This checklist helps you capture leads automatically, respond instantly using AI, tag and qualify prospects, never forget a follow-up, and book more calls without extra admin.

Tools You Need

Form: Systeme.io or Tally
Automation: Make
AI: ChatGPT
CRM + Email: Systeme.io
Keep it simple.

The Core Workflow

Lead Form → AI Summary → CRM → Tag (hot/warm/cold) → Instant Email → Follow-Up Task.

Your Form Fields

Name
Email
What do you need help with?
Budget (optional)
Short forms convert better.

AI Prompt

Summarize this lead in one sentence. Classify as hot, warm, or cold based on urgency, budget, and clarity.

Tags

Hot → ready to buy
Warm → needs follow-up
Cold → long-term nurture

Instant Email Template

Subject: Thanks for your request

Hi [Name],

Thanks for reaching out about [service]. I'll review your message and get back to you within 24 hours.

If you want to speed things up, you can book a call here: [link]

Follow-Up Rule

Hot → call within 24 hours

Warm → email within 48 hours

Cold → add to email list

Daily 5-Minute Routine

Check new leads

Call hot leads

Send one follow-up

Move deals forward

Next Step

Want this mapped for your business? Book an AI Workflow Audit.