JR Jason Rosenberg **AI Studio**

Free guide

Plain-English AI Starter Guide

Top 5 Automations Every Small Business Should Set Up First

Simple, step-by-step setups that answer leads faster, cut no-shows, and give you back your week. No coding. No jargon.

01 60-Second Lead Responder

02 Appointment Reminders & No-Show Follow-Ups

03 Automatic Meeting Assistant

04 Review Requests & Replies on Autopilot

05 Monday Morning Brief

Jason Rosenberg
Top producer, over $100 million sold · The Rosenberg Group @ Infiniti Properties
312.882.9797

Before we start

You don't need to be technical.

If you can send an email and fill out a form, you can set up every automation in this guide. Really.

I'm Jason Rosenberg, a top-producing Chicago Realtor with The Rosenberg Group @ Infiniti Properties, with over $100 million sold. I use AI and automation every day to run my own real estate business: answering leads, keeping appointments on track, following up after meetings, and staying on top of my market.

I'm not a programmer. I learned this the same way you will: one small, practical setup at a time. Now I teach individuals and teams to do the same, in plain English.

This guide gives you the **five automations I'd set up first** in almost any small business. Each one is chosen because it's quick to start, cheap or free, and pays you back right away.

Automation in one sentence

When **this** happens
→
do **that**, automatically.

That's it. Every automation is just a trigger (something happens) and an action (something gets done). AI adds the "thinking" part: writing, summarizing, and sorting.

How to use this guide

1

Pick one.
Choose the automation that would relieve the biggest headache this week.

2

Follow the 3 steps.
Each one has a simple "how to start." Most take an afternoon or less.

3

Live with it a week.
Tweak the wording, then move on to the next one.

> **A quick word on tools:** I mention popular options like Zapier, Make, ChatGPT, Grok, Claude, Gemini, Calendly, and Google Calendar/Sheets. Most have free plans to get started. Use whichever you already have. The idea matters more than the brand.

Automation 01 of 05

01 The 60-Second Lead Responder

Never let a hot lead go cold again

What it does

When someone fills out your website form, sends an email inquiry, or messages you, AI instantly drafts a warm, personalized reply in your voice. It references what they actually asked about, so it never sounds like a robot. You can review it with one tap, or let simple inquiries go out on their own.

When this happens → do this

When
A new inquiry arrives
Website form, email, or lead site

→

Then
AI reads it
Picks out name, need, and timing

→

Then
Drafts a reply in your voice
Using your own sample emails as a guide

→

Then
You approve or it sends
Lead is logged in a Google Sheet

Time it saves

Hours of "I'll get back to them later" every week. More importantly, you reply while the person is still thinking about you, which is often when they decide who to call.

Free or low-cost tools

- Zapier or Make
- ChatGPT, Claude, Grok, or Gemini
- Gmail / Outlook
- Google Sheets

How to start in 3 steps

1. Pick the one place most of your leads arrive (one form or one inbox) and start there only.
2. Paste 3–5 of your best past replies into your AI tool and ask it to describe your tone. Save that as your "voice guide."
3. Build a simple Zap: new form entry → AI writes a draft using your voice guide → draft lands in your inbox for approval.

Jason's tip: Start with "draft only" mode. Once you trust the replies, let the simple ones send automatically.

Automation 02 of 05

02 Appointment Reminders & No-Show Follow-Ups

Fewer empty chairs, zero awkward chasing

What it does

Every booked appointment automatically gets a friendly confirmation, a reminder the day before, and another one shortly before it starts. If someone doesn't show, a kind, no-guilt “want to reschedule?” message goes out with your booking link, so the relationship stays warm.

When this happens → do this

When
Someone books a time
Calendly or Google Calendar

→

Then
Confirmation goes out
With the details and how to prepare

→

Then
Reminders are sent
Day before + shortly before

→

Then
No-show? Gentle follow-up
With a link to rebook

Time it saves

Noticeably fewer missed appointments, and no more time spent sending reminder texts by hand or chasing people who forgot.

Free or low-cost tools

- Calendly (reminders built in)
- Google Calendar
- Zapier or Make
- ChatGPT / Claude for message wording

How to start in 3 steps

1. Turn on the built-in email reminders in Calendly (free) for your main meeting type.
2. Ask your AI tool to write a warm confirmation, reminder, and no-show message in your voice.
3. Add a Zap: meeting marked “no-show” or not attended → send the rebook message with your link.

Jason's tip: Keep reminders short, and always include one useful thing: the address, the parking tip, or what to bring.

Automation 03 of 05

03 The Automatic Meeting Assistant

Walk out of every call with the work already done

What it does

When a call or video meeting ends, the notes are summarized for you, action items land in your task list with due dates, and a follow-up email recapping the conversation is drafted and waiting for your review. No more scribbled notes or forgotten promises.

When this happens → do this

When
The meeting ends
Zoom, Google Meet, or Teams

→

Then
Notes are summarized
Key points, decisions, next steps

→

Then
Action items go to your list
Google Tasks, Sheets, or your to-do app

→

Then
Follow-up email is queued
Ready for you to review and send

Time it saves

The 15–30 minutes of cleanup after each meeting shrinks to a quick review. Clients also notice how fast and organized your follow-up is.

Free or low-cost tools

- Built-in meeting notes (Zoom, Google Meet, Teams)
- ChatGPT, Claude, Grok, or Gemini
- Zapier or Make
- Google Tasks / Sheets

How to start in 3 steps

1. Turn on the AI notes or transcript feature in the meeting tool you already use.
2. Create one reusable prompt: “Summarize this, list action items with owners, and draft a friendly follow-up email.”
3. Connect it with Zapier: new transcript → AI summary → tasks added + email draft created.

Jason's tip: Always tell participants you're taking AI notes. It builds trust, and in many places it's required.

Automation 04 of 05

04 Review Requests & Replies on Autopilot

Turn happy customers into your best marketing

What it does

After a job, sale, or appointment is completed, your customer automatically gets a short, personal thank-you with a direct link to leave a review. When new reviews come in, AI drafts a thoughtful, specific reply for you to approve, including calm, professional responses to the rare unhappy one.

When this happens → do this

When
A job is marked complete
In your Sheet, CRM, or calendar

→

Then
Thank-you + review link sent
At the right moment, not weeks later

→

Then
A new review is posted
Google, Zillow, Yelp, etc.

→

Then
AI drafts your reply
You approve and post

Time it saves

Asking for reviews stops depending on your memory, so it simply happens every time. Replies take seconds instead of a blank-page struggle.

Free or low-cost tools

- Google Business Profile (free review link)
- Google Sheets
- Zapier or Make
- ChatGPT / Claude / Gemini

How to start in 3 steps

1. Grab your free Google review link from your Google Business Profile.
2. Add a “Status” column to a Google Sheet of customers. When you mark it “Done,” a Zap sends the thank-you + link.
3. Save a prompt for replies: “Thank them by name, mention one specific detail, keep it under 60 words.”

Jason's tip: Follow each platform's rules: ask every customer, never offer rewards for reviews, and never write fake ones.

Automation 05 of 05

05 The Monday Morning Brief

Start every week knowing exactly what matters

What it does

Every Monday at 7 AM, AI reads through your inbox highlights and the industry news sources you care about, then sends you a clean, five-bullet summary: what needs your attention, what changed in your market, and one or two ideas worth acting on this week.

When this happens → do this

When
It's Monday, 7:00 AM
A scheduled trigger fires

→

Then
AI gathers the inputs
Flagged emails + your chosen news sources

→

Then
Boils it down to 5 bullets
Plain English, no fluff

→

Then
Brief lands in your inbox
Ready with your morning coffee

Time it saves

Less time scrolling and skimming, and fewer "how did I miss that?" moments. You walk into the week focused instead of buried.

Free or low-cost tools

- Zapier or Make (Schedule trigger)
- RSS feeds or Google Alerts
- ChatGPT, Claude, Grok, or Gemini
- Gmail / Outlook

How to start in 3 steps

1. List 3–5 news sources or Google Alerts for your industry and local market.
2. Write your brief prompt: "Give me 5 bullets: 2 to-dos, 2 market updates, 1 idea. Plain English."
3. Set a Zap with a Schedule trigger (Mondays, 7 AM) → gather sources → AI summary → email to you.

Jason's tip: Many AI assistants now offer "scheduled tasks" built in. Try that first; it may need no Zapier at all.

Next step

Want help setting these up?

You can absolutely do this yourself with this guide. But if you'd rather skip the trial and error, I'll walk you through it in plain English, using your tools and your business.

1:1 AI session

$125/hr

One hour, just you. We pick your top automation and build it together, live.

Team workshop

$750

Two hours for up to 10 people. Your whole team leaves with automations running and the know-how to keep going.

Book a free 15-minute call

We'll talk about your business and figure out which automation will save you the most time. No pressure, no jargon.

Book your free call →

calendly.com/thejasonrosenbergshow/15-min-ai-workshop-fit-call

or call **312.882.9797**

JR

Jason Rosenberg

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Top producer, over $100 million sold · The Rosenberg Group @ Infiniti Properties, Chicago

Former radio host on WLS, WCPT 820 and WCGO 1590 AM

Phone: **312.882.9797**