

30-Day Implementation Roadmap

Turn 'Someday' Into 'This Week'

WORKSHOP

Reclaim Your Workweek Workshop

EVENT

Founded in FoCo 2026

PRESENTED BY

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How to Use This Roadmap

This is not a suggestion list. It's a sprint plan with decision gates, contingencies, and measurable checkpoints. Follow it day-by-day. Each week builds on the last.

What This Roadmap Does:

- Eliminates decision paralysis with a simple quiz (Week 0) to pick your first win
- Gives you exact steps, AI prompts, and expected outcomes for Days 1-30
- Builds momentum through 4 compounding sprints: Quick Win >> Build >> Connect >> Scale
- Includes decision gates: Did you hit targets? If no, diagnose & fix before moving on
- Provides contingency plans if you get stuck (and you might -- that's normal)

Timeline Expectations:

- Week 0 (Day 1): 45 minutes to identify your first win
- Week 1 (Days 2-7): 2 hours setup + 30 min/day using the process
- Week 2 (Days 8-14): 1 hour setup + 30 min/day maintaining two processes
- Week 3 (Days 15-21): 2 hours for delegation setup + 20 min/day checking in
- Week 4 (Days 22-30): 15 min/day maintaining + 2 hours measuring and planning scale

Track everything. If it's not measured, it didn't happen.

First Win Selector Quiz

Most business owners freeze because the options are infinite. This quiz narrows it down to ONE process you'll actually fix. Answer each question, then use your highest-scoring answer as your focus.

The Four Questions:

- 1 Which task steals the most hours per week? (Count in 1-hour blocks)
- 2 Which task frustrates your team the most? (Track complaints from the last month)
- 3 Which mistake costs the most money or client trust? (One wrong step = revenue loss?)
- 4 Which task happens the same way every single time? (Repetition = automation ready)

How to Score Your Answer:

Your Scoring Guide

Question 1 (Time): 1-2 hrs/week = 1 pt | 3-5 hrs = 2 pts | 5+ hrs = 3 pts

Question 2 (Frustration): Heard once = 1 pt | Monthly complaint = 2 pts | Weekly = 3 pts

Question 3 (Cost): Minor error = 1 pt | Client upset = 2 pts | Lost revenue = 3 pts

Question 4 (Repetition): Sometimes varies = 1 pt | Usually same = 2 pts | Never changes = 3 pts

TOTAL: 8-12 points = Perfect quick win. Start here.

Once You've Picked Your Process:

- Write it down: _____
- Identify the person who does it most: _____
- Write the outcome it should create: _____

The process you picked is worth 5-10 hours/week minimum. You're not being ambitious -- you're being practical. Move to Week 1 now.

Quick Win Sprint

Timeline: 2 hours setup + 30 min/day using

Your goal this week: Automate or simplify the process you picked in Week 0. By Friday, you should have a working system that saves time on the first day of use.

Days 2-3: Map & Tool Selection (1 hour)

- 1 Write down the exact steps of your process in order. (Not how it 'should' work -- how it actually works right now.)
- 2 Circle the 3 steps that waste the most time or cause the most errors.
- 3 Pick ONE tool from the checklist below to handle those steps.

Tool Picker: Match Your Process Type

Data entry into a form or system? >> Zapier or Make

Copy/paste between apps? >> Zapier or Make

Sending templated emails/messages? >> Claude (via API) or n8n

Sorting/filtering/reporting data? >> Claude (analysis) or Airtable

Schedule tasks or wait for triggers? >> Zapier or Make

- 4 Set up a 15-minute test run of your chosen tool. (Don't aim for perfect -- aim for working.)
- 5 If tool setup breaks, use the diagnostic below. If it's still broken by end of today, pivot to the next tool on the checklist.

Common Tool-Setup Killers (Diagnose & Fix):

Tool Setup Diagnostics

- X 'It's too complicated' >> Watch a 2-min setup video (Zapier, Make have them)
- X 'It won't connect to our app' >> Check if the app is officially supported
- X 'It's slow / timing out' >> Reduce the test batch to 1 item, not 10
- X 'It costs too much' >> Free tier usually covers 100+ tasks/month
- ✓ If still stuck, use the Contingency Plans (end of this roadmap)

- 6 Live test with 10 real items from your actual process. Track: How long did it take? How many errors?
- 7 Deploy at 50% scale on Friday (e.g., automate for half your team or half your daily volume)

What Good Looks Like at End of Week 1:

Week 1 Success Criteria

- ✓ New process works without manual fixes
- ✓ Time savings visible on Day 1 (even if just 30 min)
- ✓ Zero errors in the live test
- ✓ Team member(s) trained and using it
- ✓ You know exactly how much time you saved (time it both ways)

Decision Gate: Week 1 Checkpoint

Did you hit the above criteria?

- YES >> Celebrate & move to Week 2
- PARTIAL >> You're 80%. This is enough. Move to Week 2 and refine there.
- NO >> Diagnose below. Do not move to Week 2 until this is working.

If Week 1 Stalled: Quick Diagnostics

- A** Bad tool choice: Pick a different tool, do 15-min test, assess again (30 min total)
- B** Process too complex: Simplify it first. Remove 1-2 steps, then automate. (1 hour)

- C** Team not using it: Run a 10-min group demo + send a 2-min video. (30 min)
- D** Setup takes longer than expected: That's normal. Set timer for 1 more hour. If still stuck, use contingency plan on Page 11.

Most teams get Week 1 right on the 2nd attempt. You're not behind. You're learning.

Build Momentum

Timeline: 1 hour setup + 30 min/day using

Success this week means: Keep Week 1 process running + automate a 2nd process + spot the first moment Week 1 might derail (and prevent it).

Your Mission:

- 1 Pick a 2nd process from your top-3 list (use the quiz scores). Go through the same Week 1 flow (map, tool, test, live).
- 2 Keep Week 1 running in parallel. If it's working on autopilot, great. If it's starting to break, fix it SAME DAY.
- 3 Watch for momentum killers on Days 9-12 (listed below). If you see one, act immediately.

Momentum Killer Checklist:

Common Derailers & Prevention

- Tool acts 'weird' after a few days >> Check app notifications, reset connection
- One team member ignores the new process >> Call it out, re-train, or reassign
- Client data enters the system wrong >> Add a validation step or template
- You forgot why you were doing this >> Re-read the time-saved metric. It's proof.
- Setup for Process 2 is taking longer than Process 1 >> You're faster now. Don't overthink it.

What Good Looks Like at End of Week 2:

Week 2 Success Criteria

- ✓ Week 1 process still running + logged time saved (even if 5 min = counts)
- ✓ Week 2 process mapped, set up, and live at 50% scale
- ✓ Combined processes now save 5-10+ hours/week
- ✓ Zero emergency firefights to keep things running
- ✓ Team knows both processes and runs them without prompting

Decision Gate: Week 2 Checkpoint

- Week 1 + 2 both working >> Move to Week 3

- One process stalled >> Pause Week 2 setup, fix Week 1, restart Week 2 on Day 12
- Both processes failing >> See Contingency Plan (Page 11)

If you're here, you've already proven you can automate. This is huge. The rest is just more of the same, at scale.

System Thinking

Timeline: 2 hours delegation setup + 20 min/day checking

This week you stop being the operator and start being the architect. You'll connect your two automated processes, build handoffs, and delegate to your team.

Step 1: Map the Handoff (1 hour | Day 15)

Where does Process 1 end and Process 2 begin? (Or: How does an action in one trigger an action in the other?) Draw it:

Process 1 output >> _____

Process 2 input << _____

- 1 Does an automated email from Process 1 trigger data entry in Process 2?
- 2 Does a report from Process 2 feed back into Process 1?
- 3 Do both processes feed into a single dashboard or CRM?

If your answer to any of these is YES, build a connecting automation. (Usually 30 min in Zapier or Make.)

Step 2: Delegation Framework (1 hour | Days 16-17)

The 4-Step Delegation Flow

- 1. Task Assignment: Who owns Process 1? Who owns Process 2?
- 2. Monitoring: How will you know if either is breaking? (Weekly metrics?)
- 3. Escalation: When do they tell you? (Daily if broken, weekly if slow)
- 4. Maintenance: Who fixes it if it breaks? (You? Them? A vendor?)

Fill in Your Delegation Assignments:

Process	Owner	Monitor (How?)	Fix If Broken
Week 1 Process	[Name]	[Weekly report?]	[You or them?]
Week 2 Process	[Name]	[Weekly report?]	[You or them?]

Step 3: Team Training Session (1 hour | Day 18)

- Show them the full flow: How does work enter >> get processed >> exit?
- Teach them the decision point: 'If [X breaks], do [Y].'
- Walk through ONE full transaction together. Then let them do one solo.

Step 4: Live Handoff Trial (Days 19-21)

- Let your team run both processes end-to-end for 3 days.
- You observe ONLY. No jumping in unless something breaks.
- Track: Did they follow the process? Did they know when to escalate?

What Good Looks Like at End of Week 3:

Week 3 Success Criteria

- ✓ Both processes are connected (if applicable) or clearly run in sequence
- ✓ Team members are trained and own their process
- ✓ You ran a 3-day observational test with minimal issues
- ✓ You know who to call if something breaks
- ✓ Time saved is now 10-15+ hours/week

Decision Gate: Week 3 Checkpoint

- Team is operating independently >> Move to Week 4
- Team still needs babysitting >> Add 1 more week of training before scaling
- Process is breaking under team use >> Fix the process, not the person. Redesign.

If your team can run this without you, you've built a system. Hire someone, work on sales, or go build another system.

Measure & Scale

Timeline: 15 min/day maintaining + 2 hours measuring

This final week is about proving ROI and deciding what to automate next. You'll measure what you've built, calculate savings, and choose your scaling path.

Step 1: Measure the Win (1 hour | Day 22-23)

For both processes, track:

The Metrics That Matter

Hours Saved: (Old time per week) - (New time per week)

Errors Reduced: Count wrong outputs BEFORE vs AFTER

Quality Improvement: Ask the person who uses output. Better? Faster? Cleaner?

Handoff Efficiency: Did Process 2 wait for Process 1 before? Not anymore?

Team Mood: Did complaints go down? Did someone ask to automate another task?

Your Measurement Template:

Metric	Before (Week 1)	After (Week 4)	Savings
Hours/week	[?]	[?]	[? hours]
Errors/week	[?]	[?]	[? fewer]
Customer satisfaction	[score]	[score]	[+? points]

Step 2: Calculate ROI (1 hour | Day 24-25)

Simple ROI Formula

Annual Hours Saved = Weekly Hours Saved × 52

Annual \$ Value = (Annual Hours Saved) × (\$ per hour for your team)

Tool Cost = (Monthly cost) × 12

Net Benefit = Annual \$ Value - Tool Cost

Example: 8 hrs/week saved × 52 weeks = 416 hrs/year

416 hrs × \$50/hr = \$20,800 value | Zapier @ \$50/mo = \$600 cost

Net Benefit = \$20,800 - \$600 = \$20,200 ROI year 1

YOUR ROI CALCULATION:

Weekly hours saved: _____

Hourly rate for your team: \$ _____

Annual tool cost: \$ _____

ANNUAL NET BENEFIT: \$ _____

Step 3: Choose Your Scaling Path (1 hour | Day 26-27)

You've now proven automation works. Next is scaling. Pick ONE path:

Path A: Roll Out to 3 More Processes

Take your top 3 processes from the initial assessment.
Run each through the Week 1-2 sprint (3 weeks total).
Timeline: 3-6 weeks to add 15-20 hrs/week
Best for: Teams with lots of repetitive work

Path B: Train Another Team Member to Build

Pick one person on your team.
Teach them the 4-week process you just followed.
They pick their own first win and run the sprint.
Timeline: 6-8 weeks, unlocks 5-10 hrs/week per person trained
Best for: Growing teams that need autonomy

Path C: Build a Business Case for Hiring

Document: Time saved, ROI, cost, quality gains.
Pitch: 'This automation freed up 10 hours/week.'
Ask: 'Can we hire a contractor for \$X/month to do [Y] instead?'
Timeline: 2-4 weeks to scope and hire
Best for: Scaling without overloading current team

Your Scaling Choice (Circle one):

- Path A: Roll out to 3 more processes
- Path B: Train another team member
- Path C: Build business case for hire
- Combination: _____

Step 4: 30-Day Momentum Check (Days 28-30)

- Week 1 process: Still running? Time still tracked? Team still using?
- Week 2 process: Same questions.
- Team sentiment: Do they believe in automation now? Or are they dragging?
- Your next move: Scheduled and in calendar?

If you've made it here, you're no longer 'thinking about' automation. You're living it. Everything from here is refinement and scale.

This Roadmap Connects To:

You didn't invent automation in isolation. These materials will help you fill the gaps and go deeper.

Reclaim Your Workweek Materials

- >> Client Communication Hub: Use templates for Week 2 team training
- >> 4D Decision Tree: Reference for choosing between tools (Weeks 1-2)
- >> Meeting Prep System: Use for weekly team check-ins (Weeks 2-4)
- >> AI Prompt Library: Prompts for Claude integration in automation (Every week)

External Resources by Week

- Week 1: Zapier/Make setup tutorials (YouTube, 2-5 min each)
- Week 1: Your tool's native documentation (app.zapier.com, make.com)
- Week 2-3: Team delegation frameworks (see Step 2 of Week 3)
- Week 4: Google Sheets ROI template (simple formula-driven sheet)

When You Get Stuck:

- 1 Check the contingency plans on the next page first (solves 80% of issues)
- 2 Watch a tool setup video (1-5 min usually fixes it)
- 3 Ask in the workshop Slack/group
- 4 Book a 20-min call with a Local Nerds strategist (link in your workshop materials)

You've Built Systems. You're Not Done -- You're Just Beginning.

Contingency Plans

You will hit friction. This is normal. Use this page to diagnose and move forward -- don't stall.

Scenario: 'Week 1 setup is taking too long'

Diagnose & Fix

Cause: Perfectionism or over-engineering

Fix: Set a 1-hour timer. Build the 'dumb' version first. Improve later.

Cause: Tool is genuinely too hard

Fix: Try a different tool. Airtable > Make? Slack bot > Zapier?

Cause: Your process is too complex to automate

Fix: Simplify first. Remove 1-2 steps. Automate what's left.

Action: You have 1 more hour. After that, move to Week 2 anyway.

Scenario: 'Team is not using the automated process'

Diagnose & Fix

Cause: They don't understand it

Fix: Show them the output, not the setup. 'Here's the email that gets sent.'

Cause: It breaks sometimes, so they don't trust it

Fix: Fix the broken piece. Use their feedback. Trust is earned.

Cause: It feels like 'extra work' to use the new process

Fix: Make the old way impossible. Remove manual forms. Replace with automation.

Action: Run a 30-min team meeting. Show one full transaction end-to-end.

Scenario: 'The automation broke mid-week'

Quick Triage (Do This First)

Check: Is the 3rd-party app down? (Check status.zapier.com, status.make.com)

Check: Did the source app change? (API updates, UI changes)

Check: Is data formatted wrong? (Added a new field that broke the automation?)

If none of above: Rerun one test transaction. Does it work now?

If still broken: Rollback to old process. Fix automation later that week.

Scenario: 'I'm only saving 2 hours/week, not 5'

Diagnose & Fix

You picked the wrong first process. That's OK.

Go back to your top-3 list. Pick #2 and add it in Week 2.

Together, they'll hit your target.

Also: Are you ACTUALLY using the automation? Or defaulting to old way?

Commit to new way for one full week. Measure again.

Scenario: 'Halfway through Week 2, I want to quit'

Reality Check

Normal. Most teams hit this point around Day 10.

Why: You're tired, the novelty wore off, and it feels like extra work.

What to do: STOP. Run ONE quick win you know works (Week 1 process).

Celebrate that win. Measure it. Remind yourself: 'I already saved 6 hours.'

Come back to Week 2 on Day 12 with fresh energy.

Every team that has gone through this felt stuck at some point. The ones who didn't quit are now running their business on autopilot. Be that team.

30-Day Time Commitment Breakdown

This is what you're signing up for -- no hidden time sinks:

Week	Setup Time	Daily Upkeep	Total/Week	What You Get
0	45 min	0 min	45 min	First process chosen
1	2 hrs	30 min	4.5 hrs	1 process automated
2	1 hr	30 min	4.5 hrs	2nd process + momentum
3	2 hrs	20 min	3.5 hrs	Team delegation setup
4	2 hrs	15 min	3 hrs	ROI proof + scale plan

Total Time Investment:

16.5 hours over 30 days | ~3.3 hours/week | 30 min/day average

Payback Period:

- Week 1 ends: 5 hours saved
- Week 2 ends: 10 hours saved (cumulative)
- Week 3 ends: 12+ hours saved
- Week 4 ends: 15+ hours saved (recurring, EVERY WEEK)

You spend 16.5 hours to save 15 hours EVERY WEEK. Payback happens in 2 weeks. By week 8, you've saved 60 hours.

"What Good Looks Like" Benchmarks

These are real benchmarks from teams who've done this. Where should you be at each stage?

End of Week 1:

Week 1 Benchmark

- Time saved: 3-6 hours per week (visible on day 1)
- Error rate: 0 errors in live test (or 1 you can explain)
- Team adoption: 50-70% using new process without reminders
- Your confidence: 'This actually works.'
- Tool stability: 2-3 day test run, zero crashes

End of Week 2:

Week 2 Benchmark

- Time saved: 8-12 hours per week (both processes combined)
- Error rate: Same as Week 1 (proves stability, not luck)
- Team adoption: Week 1 process now runs without you
- Your confidence: 'We can automate anything.'
- Momentum: You've already thought of 2-3 more processes

End of Week 3:

Week 3 Benchmark

- Team ownership: They own both processes, not you
- Process handoff: One person can explain the full flow
- Escalation clarity: They know when to call you (and when NOT to)
- Time saved: Still 10-15 hours per week (no degradation)
- Your role: Mentor, not operator

End of Week 4:

Week 4 Benchmark

ROI proven: \$5,000+ annual value (minimum, conservative estimate)

Scaling plan: Next 3 processes identified and prioritized

Team readiness: They want to build more automation

Your next move: Scheduled and in calendar

Recurring benefit: 15+ hours/week, sustainable, minimal maintenance (< 30 min/month)

Red Flags (If you see these, get help):

- End of Week 1: Process hasn't saved any time yet
- End of Week 2: Team is STILL manually doing the old way
- End of Week 3: You're babysitting every transaction
- End of Week 4: You can't measure the benefit (means you didn't track)

If you're at or above the benchmark for your week, you're on track. If you're below, use the diagnostics and contingency plans -- don't push ahead.

30-Day Roadmap Action Plan

Fill this in BEFORE you start. This is your contract with yourself.

Day 1 Commitments:

1. Process I'm automating first: _____
2. Person who will operate it: _____
3. Time I'm blocking for Week 1 setup: _____
4. Date I'll measure the first win: _____

Week 1 Checkpoint (Day 7):

- Hours saved this week: _____
- Quality or accuracy improved? (yes/no): _____
- Team trained and using? (yes/no): _____
- Decision: Proceed to Week 2 or fix? _____

Week 2 Checkpoint (Day 14):

- Total hours saved (W1 + W2): _____
- Both processes stable? (yes/no): _____
- Any momentum killers hit? List: _____
- Decision: Proceed to Week 3 or regroup? _____

Week 3 Checkpoint (Day 21):

- Team running both processes independently? _____
- Processes connected/in sequence? (if applicable): _____
- You spending less than 30 min/day on this? _____
- Decision: Proceed to Week 4 or train longer? _____

Week 4 Final (Day 30):

Annual ROI (see formula from Week 4): \$ _____

Scaling path chosen (A, B, or C): _____

Next process to automate (if scaling): _____

When do we start? (date): _____

Commitment Checkpoint

Print this page. Post it where you can see it every day. This is your accountability contract. You're not automating 'someday.' You're doing it THIS MONTH.

Committed to start on: _____

No signature needed -- just commitment. Show up. Follow the sprints. Measure the wins.