PROFIT & PRESENCE CO.

THE COMPLETE GUIDE

WITH AN AI PROMPT FOR EVERY STEP

The *ROAD* Method™

Know what to remove, fix, automate and hand off before you build anything. Four steps, in order.

R	O	A	D
REMOVE	OPTIMIZE	AUTOMATE	DELEGATE

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01 · START HERE

Before you build anything.

Most founders I meet aren't short on tools. They're short on time, and every new tool asks for a little more of it.

You've probably tried AI. You handed it a prompt, got back something that was fine, and closed the tab. Or you paid for an automation, and now you check on it, which is its own kind of work.

Here's what I've learned building my own business and my clients': AI multiplies whatever you drop it into. Drop it on a week that doesn't fit you and you get the mess faster. The ROAD Method™ is the sort I run before I build any AI tool, so what I build takes weight off instead of adding it.

01

What you need

- Your calendar from the last two weeks
- Your task list, however messy it is
- An AI chat tool: Claude or ChatGPT both work
- About 90 minutes for your first pass

02

How it runs

- Do Step 0 first. Everything else sorts that list.
- Go in order. No skipping to Automate.
- Copy each prompt into your AI tool, then paste in your own details.
- Run it again every 90 days. Your season changes, and so does the list.

A NOTE ON THE PROMPTS

Every prompt here makes AI do the gathering and leaves the deciding to you.

Push on what it gives back. Words in **[brackets]** inside a prompt are where your details go.

02 · WHY THE ORDER MATTERS

You can't hire your way out of a subtraction problem.

I used to say "I just need a VA" about a hundred times a week. So I hired one. For about three weeks it felt like relief. Then she was asking me questions all day, and I was spending more time explaining tasks than the tasks would have taken me.

Years later I did the same with AI: three workflows that didn't talk to each other, and every one needed me to check on it. The AI was running me. Both times, I added to a week that needed things taken away.

Delegating first moves the work. Removing and reshaping it gives the time back.

IF YOU SKIP TO	WHAT USUALLY HAPPENS
Automate	You build a fast version of a process that shouldn't exist, or one you've never run the same way twice. Now you maintain it.
Delegate	Someone inherits your mess plus your questions. You become their help desk, and the hours you hoped to free go to managing them.

R **Remove.** If you stopped doing it, would anyone notice besides you? The step everyone skips, because nobody likes the change.

O **Optimize.** Most things land here. The work needs to exist. It's shaped wrong.

A **Automate.** AI and automation do their best work after the first two steps, never before.

D **Delegate.** Now there's something clean enough to hand to a person, and you can say what it is.

03 · STEP 0

Get it out of your head first.

You can't sort what you can't see.

Before Remove, you need one honest list of what you did in the last two weeks: the client work, the admin, the "quick" things, the stuff you do at 9pm because nobody else will. By hand, scroll back two weeks in your calendar and write every block and task with a rough time next to it. Include the invisible ones: checking on people, re-sending links, fixing things, deciding things.

AI PROMPT 0 · BUILD MY MASTER LIST

I'm a founder doing a time audit using the ROAD Method (Remove, Optimize, Automate, Delegate). Below is my calendar from the last two weeks and my current task list. Build me one master list of every recurring task and responsibility you can find.

For each one, give me: the task, how often it happens, your best estimate of hours per week, and who does it now. Add a separate section called "invisible work" for things that are implied but not written down, like checking on someone, re-explaining, following up or fixing errors. Ask me about anything you're unsure of instead of guessing. Don't sort or recommend anything yet.

My calendar: [paste or describe your last two weeks]
My task list: [paste it, messy is fine]
About my business: [what you sell, team size, your hours]

Tip: most AI tools can read a pasted calendar export or a screenshot. Paste in chunks if it's long.

What you'll have when you're done

A list of 30 to 80 items with rough hours. Total them. That number is your starting point, and the rest of this guide is about making it smaller.

0 **Total hours per week on my list:**

R

STEP 1 OF 4

Remove

What can you stop doing entirely? This is the most powerful step and the most uncomfortable one, because most of what lands here is something you chose, and kept choosing out of habit, guilt or fear.

If I stopped doing this, would anyone notice or care besides me?

STEP 1 · REMOVE

Four questions for every item.

01

Who asked for this?

If the answer is "nobody, I started it," it's a candidate. Plenty of founders run reports nobody reads and send updates nobody opens.

02

What happens if it stops?

Picture the week after. If the answer is "not much," stop it. If it's "a client would be upset," it moves to Optimize, not Remove.

03

Does it move money, clients or family?

Work that does none of the three needs a very good reason to stay.

04

Why am I still doing it?

Habit, guilt and fear are the three answers that usually mean it can go.

Where removable work hides

- **Offers you don't want to sell.** Sometimes the fix isn't hiring someone to fill the gaps. It's no longer selling the work that creates them.
- **Meetings that exist out of habit.** Standing calls that could be a short written update, or nothing.
- **Custom everything.** Every client gets a slightly different process, so you have to remember all of them.
- **Checking.** Re-reading what your team or AI already did, "just to be sure."

Removing doesn't have to cost the high-touch feel

Remove the busywork around the client, and the parts they feel get more of your attention, not less.

STEP 1 · AI PROMPTS

Let AI find the first draft of your cuts.

AI PROMPT R1 · FIND WHAT I CAN STOP

Here is my master list from a time audit. Act as a blunt but kind operations advisor. Go through every item and sort it into three groups: "Remove" (could stop entirely with little or no impact), "Question" (might be removable, I need to check something first) and "Keep" (needs to exist).

For each Remove and Question item, tell me in one sentence why, and what would most likely happen if I stopped. Flag anything I'm probably doing out of habit, guilt or fear. Then total the weekly hours in the Remove group. Don't be polite about it. I want the honest list.

My master list: [paste it]
What matters most to me this season: [revenue goal, family priority, hours you want to work]

AI PROMPT R2 · SAY IT OUT LOUD

I've decided to stop doing [the thing]. It affects [clients / my team / a partner]. Write me a short, warm message telling them, in a plain and direct voice. Say what's changing, when, and what they can expect instead, if anything. No over-apologizing and no long explanation. Give me two versions: one for email and one for a quick text or Slack message.

AI PROMPT R3 · PRESSURE-TEST THE ONE I'M ATTACHED TO

There's one thing on my list I don't want to give up: [the thing]. Ask me five questions, one at a time, to help me figure out if I'm keeping it because it works or because I'm attached to it. Wait for my answer before asking the next one. At the end, tell me what you heard.

STEP 1 · WORKSHEET

My Remove list.

WHAT I'M STOPPING	HRS / WK	WHO I NEED TO TELL	STOP DATE

STILL DECIDING	WHAT I NEED TO FIND OUT FIRST

01 **Hours I'm getting back from Remove:**

02 **The one I'm most nervous to stop, and why:**



STEP 2 OF 4

Optimize

Most of your list lands here. The work needs to exist, and it's shaped wrong: too many steps, too many decisions, too much of it living in your head.

Same result. Fewer steps. Fewer decisions. Less of you.

STEP 2 · OPTIMIZE

Six ways to reshape the work.

01

Batch it

Do like things together. All replies in one block, all approvals in another. Switching between kinds of work costs more than the work.

02

Template it

If you've written it three times, it should be a template. Proposals, onboarding emails, follow-ups, the answer to the question everyone asks.

03

Decide once

Turn repeat decisions into rules. "Rush requests need 48 hours." "Calls on Tuesdays and Thursdays only." A rule is a decision you never make again.

04

Write the checklist

Stop running it from memory. Do it by hand a few times, write the steps down, and that checklist becomes the instructions someone else, or AI, follows later.

05

Cap the time

Work expands to fill the time you give it. Give it less, on purpose.

06

Shrink what reaches you

Only real judgment calls should come to you, as the issue, two options and a recommendation, so you decide and move on.

A WORKED EXAMPLE · NEW CLIENT ONBOARDING

BEFORE · ABOUT 90 MINUTES

A welcome email from scratch, a separate intake form, a booking link once they reply, then chasing the form.

→

AFTER · ABOUT 15 MINUTES

One welcome template with the form and booking link together, a kickoff checklist, and no kickoff until the form is in.

STEP 2 · AI PROMPTS

Use AI to reshape, not only speed up.

AI PROMPT 01 · FEWER STEPS

Here's how I do [process] today, step by step: [paste the steps, or describe it]. Rewrite it with the fewest steps that still get the same result for the client. Combine steps that can happen together, cut handoffs, and point out every place where I'm making a decision that could become a rule. Show me before and after side by side, with your estimate of time saved.

AI PROMPT 02 · TURN MY EXAMPLES INTO A TEMPLATE

Below are three examples of [emails / proposals / onboarding messages] I've written. Study the structure, tone and what's always included. Build me one reusable template with clearly marked blanks, plus a short note on when to use it. Keep my voice; don't make it sound more corporate than I do.

Example 1: [paste] · Example 2: [paste] · Example 3: [paste]

AI PROMPT 03 · DECIDE ONCE

These are decisions I find myself making over and over: [list them]. For each one, help me write a simple rule I can follow every time, with any exceptions spelled out. Ask me questions if you need my preferences. Format the result as a one-page "how we decide" sheet my team could use.

AI PROMPT 04 · WRITE THE CHECKLIST

I'm going to describe how I do [task] out loud, messy and out of order. Turn it into a clear numbered checklist someone else could follow without asking me questions. Flag any step where they'd still need to ask me something, and tell me what's missing. Here it is: [talk it through]

STEP 2 · WORKSHEET

My top three to reshape.

Pick the three items on your Keep list that take the most time or cause the most friction.

01 **The task, its time now and my target time:**

How I'll reshape it (batch, template, rule, checklist, cap, shrink):

02 **The task, its time now and my target time:**

How I'll reshape it:

03 **The task, its time now and my target time:**

How I'll reshape it:

04 **Hours I'm getting back from Optimize:**

A

STEP 3 OF 4

Automate

Now technology can carry the repeatable. Not before.
Automating a broken process gets you the broken result faster, and then you have to babysit it.

AI gathers. You decide.

STEP 3 · AUTOMATE

Three kinds of work, three owners.

Every step of a process belongs to one of three owners. Getting this right is most of the job.

01

Automation

Rules and triggers, no judgment. Anything that happens the same way every time once something else happens.

02

AI

Drafts, sorts, summarizes. Work that needs reading and writing but not your final call. Draft replies in your voice, sort the inbox, summarize a call, plan your week inside your limits.

03

You or a person

Judgment and relationship. Decisions, money, hard conversations, anything where being wrong costs trust.

The highest-value places to start

- **Lead to client.** Inquiry, booking, proposal, contract, invoice, welcome.
- **Onboarding and offboarding.** The same steps for every client.
- **Your week.** One message to an AI planner that knows your guardrails (school pickup, your best focus hours, the days you don't work) and books your focus time and tasks for you.
- **Follow-up.** Nothing slips because nobody remembered.

Before you automate, check

- [ ] I've done this by hand the same way at least five times.
- [ ] It's written down as a checklist (Step 2).
- [ ] I know which steps need my judgment, and those stay with me.
- [ ] I know how I'll find out if it breaks, without checking on it every day.

STEP 3 · AI PROMPTS

Map it, then build it.

AI PROMPT A1 · WHO OWNS EACH STEP

Here's my process for [process], already simplified: [paste the checklist]. For every step, label the owner as Automation, AI or Human, and say why in a few words. For each Automation step, name the trigger and what it should do. For each AI step, describe what it reads and what it produces. For each Human step, tell me if there's a way to make my part smaller. Then suggest which single step to automate first for the biggest time savings.

Tools I already pay for: [e.g. Gmail, Google Calendar, ClickUp, Slack, Kit, Dubsado]

AI PROMPT A2 · WRITE MY AI EMPLOYEE'S JOB DESCRIPTION

I want an AI assistant to own [job, e.g. planning my week / drafting inbox replies / prepping client calls]. Write its standing instructions as if you were onboarding a new hire. Include: its job in one sentence, what it reads, what it produces and where, the rules it must never break, my guardrails (working hours, family commitments, things only I decide), how it should write (my voice), and when it must stop and ask me. Keep it under one page.

My guardrails: [e.g. I work 9 to 2 Monday to Thursday, never book over pickup, focus work before noon]
How I sound: [paste two short things you've written]

AI PROMPT A3 · TEST IT BEFORE I TRUST IT

Here's an automation or AI workflow I just set up: [describe it]. Write me a short test plan: five realistic test cases, including two that should fail or need a human, and what the right result looks like for each. Then list the three most likely ways this breaks quietly, and how I'd notice.

STEP 3 · WORKSHEET

My automation map.

STEP IN THE PROCESS	OWNER: AUTO / AI / ME	TRIGGER OR TOOL

01 The first thing I'm automating this month:

02 How I'll know it's working without checking on it:

03 Repetitive tasks to come back to next:

04 Hours I'm getting back from Automate:

D

STEP 4 OF 4

Delegate

Notice this is last. After you've removed, reshaped and automated, what's left is clean enough to hand to a person, and you can say what you need.

Hand off the work, not the mess around it.

STEP 4 · DELEGATE

What to hand off first.

Work that's written down

If it lives in your head, it isn't ready.

Work you've already reshaped

So a person runs the system instead of inventing it.

Work that drains you

Your least favorite task is somebody's favorite.

80% done by them beats 100% by you

Hire for values first and skills second.

AI PROMPT D1 · TURN MY VOICE MEMO INTO A HANDOFF DOC

Below is a transcript of me explaining how I do [task]. Turn it into a handoff document for a team member: the goal, when it happens, step-by-step instructions, what "done well" looks like, common mistakes, and which decisions they can make on their own versus bring to me. Where I was vague, write a question for me in brackets instead of guessing.

Transcript: [record yourself explaining it, then paste the transcript]

AI PROMPT D2 · WRITE THE ROLE

From my Remove, Optimize and Automate work, here's what's left that a person should own: [paste the list]. Group it into one role. Give me a role summary, the outcomes they're responsible for, roughly how many hours a week it is, the skills and traits that matter most (values first), and three interview questions that would show me if someone fits.

AI PROMPT D3 · ONLY THE JUDGMENT CALLS REACH ME

Write a short guide for my team on how to bring me decisions. Every request should arrive as the issue in one sentence, two options, and their recommendation. Include an example of a good request and a bad one, and a list of decisions they can make without me: [list them].

STEP 4 · WORKSHEET

Am I ready to hand it off?

- [ ] I've removed everything that doesn't need to exist.
- [ ] I've reshaped what's left so it takes fewer steps and fewer decisions.
- [ ] I've automated what can run without judgment.
- [ ] I can describe what I need in two sentences.
- [ ] There's a written handoff doc for the key tasks.
- [ ] I know which decisions they can make without me.

WHAT I'M HANDING OFF	TO (PERSON OR ROLE)	HRS / WK	HANDOFF DOC READY?

01 **Hours I'm handing off:**

02 **What I'll do with that time (a person, a day, a thing):**

PULL IT TOGETHER

Your ROAD audit.

STEP	HOURS PER WEEK
R · Removed (stopped entirely)	
O · Optimized (same result, less time)	
A · Automated (tools and AI carry it)	
D · Delegated (a person owns it)	
Total hours back each week	

Run it every 90 days

ROAD isn't one and done. Your season changes: a new client load, summer, a new baby, a new offer. Every 90 days, run Step 0 again and sort the new list. Things creep back. That's normal. The reset is what keeps them from staying.

AI PROMPT · MY 90-DAY RESET

Here's my ROAD audit from last quarter: [paste it]. Here's my calendar and task list from the last two weeks: [paste]. Compare them. What crept back in? What did I remove that's quietly returned? What new work showed up that needs sorting? Give me a short list of the three changes that would give me the most time back this quarter.

MY NEXT THREE MOVES

01

02

03

WHAT'S NEXT

Want help building it around you?

The guide gets you the list. Building the business around the way you work, with the right people and AI in place, is what I do with founders every week.

FREE · START HERE

Take the *Inspection*

A few minutes, and it shows you which room of your business is costing you the most time right now, and the one change to make first.

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YOUR NEXT MOVE

Book a *Blueprint Call*

One call, and you leave with your one clear next move. Sometimes it's an AI office. Sometimes it's a hire. Sometimes it's something you stop doing altogether.

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Not sure which? Grab a free 30-minute chat and we'll figure it out together.



ABOUT

Hi, I'm Lauren.

I'm the founder of Profit & Presence Co.™ and the anti-systems systems person: I build the business around you, then put the right people and AI in place so it runs when you close the laptop. My own AI office handles my inbox, my calendar and my follow-ups. Mom of five. Former pastor. Columbia, South Carolina. Laptop closes at four.

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