

Crawl-Walk-Run AI Order Automation *Planner*



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AI and automation don't have to be a massive transformation project. You don't need to rebuild your business or chase some futuristic vision to see results. Real impact comes from understanding where orders stall, where work gets repeated, and where your team is spending time on tasks that don't drive revenue. AI will not only power your team to work faster, but take tedious tasks off their plate, so they can spend more time on what actually matters – driving more orders.

That's where order automation starts.

Imagine what you could do with AI. Sure—you could build something flashy and complex. But what if it just took orders for you? Captured details accurately. Followed up automatically. Routed work to the right place without someone babysitting it.

For distributors, the real win isn't "epic." *It's removing the mundane:*

- Re-typing orders
- Sorting inboxes
- Chasing quotes
- Following up manually

This roadmap is about using AI where it matters most—quietly eliminating friction, freeing up your team, and making it easier to capture every order that comes your way.

Pain of inaction | *Not using AI and automation*

Missed orders	Texts, notes, voicemails get missed, forgotten, or answered too late.
Customer Churn	Your customers move to distributors who respond fast.
Reps stuck reacting	They're stuck trying to keep up, missing opportunities to drive more orders.
Growth stalls	The business feels busy but order volume stays the same.

Key Outcomes | *If you use AI and Automation*

Faster response = more orders:	First distributor to quote wins the order, automation lets your reps be the first every time.
Capture orders that otherwise slip through	Connect every conversation to a single workspace so the whole team has visibility, eliminating "we never heard back" losses.
Unlock data for tailored marketing	With automated interactions all in one place, your team has accurate customer data they can act on.
Sell more without adding to your team's workload	1 rep can handle 3x the orders when you eliminate rekeying, searching, and putting customers on hold.
Turn the front-of-house into a proactive order driver	Less time on manual work means more time for upsells/cross-sells and intentional outreach.

How to use this Planner:

This guide is designed to be practical, not theoretical. You don't need new systems or a massive overhaul to get value—just focused changes, applied in sequence.

Use it in three phases:

Crawl (Days 0–30) *Stabilize*

Start by reducing chaos. Standardize how orders come in, eliminate re-keying, and ensure every request gets a fast, consistent response. Focus on speed, accuracy, and visibility.

Walk (Days 31–60) *Connect*

Once intake is stable, connect quotes, orders, and conversations. Add follow-ups, tags, and routing so nothing slips through—and your data starts working for you.

Run (Days 61–90) *Grow*

With time saved and errors reduced, shift from reactive order taking to proactive selling. Use AI and triggers to upsell, retain accounts, and drive more orders with the same team.

How to get the most value:

Pick 1-2 plays per phase—don't try to do everything at once.

Use the worksheets and checklists to document decisions and create consistency.

Track the KPIs listed in each phase to prove impact and guide what to automate next.

Treat AI as a force multiplier, not a replacement—start simple and layer it in where manual work is slowing you down.

1. **Goal:** Stabilize & speed up order handling.
2. **Why Care:** Reduce manual steps, speed responses, and fewer errors.
3. **Key Outcome:** Faster order capture, consistent communications.

Standardize how orders are captured

- Pick 1–2 “official” channels for orders (e.g., phone + text or phone + shared email) and commit to routing everything there.
- Create a simple intake template: customer name, contact, PO/job, part/SKU, promised time.



How AI
can help:

Automatically capture details, pull names, SKU, PO/job, into your data base without manual intake.

Turn on basic automations for order confirmation

- Acknowledge an order request or a quote comes in (“We’ve received your request; here’s what happens next.”)
- Use saved responses or templates to keep messages consistent.



How AI
can help:

Send out automatic follow ups alerting a customer that their message has been received.

Eliminate re-keying

- Wherever possible, reuse data instead of retyping it:
 - *Copy quote details straight into the order.*
 - *Use saved item bundles/kits for common jobs.*



How AI
can help:

Pull relevant customer, product, and pricing info directly into the order workflow.

Introduce a standard quote template

- Create one standard quote format that includes: items, pricing, expiration, and the next step.
- Save it as a reusable template in whatever channel they use most (email/text).



How AI
can help:

Automatically generate a quote template as soon as the order is received.

Crawl KPIs to Watch:

- Average time to acknowledge a new order or quote request.
- % of orders captured using the standard template.
- # of orders requiring rework or a callback.
- Time spent rekeying .

Section 3

Walk | Days 31–60: Deeper Workflow & Data Automations [Centralize]

1. **Goal:** Connect automated quotes and orders to your workflows to eliminate errors and enrich your data.
2. **Why Care:** Reduce missed follow-ups, manual errors, and inconsistent order handling.
3. **Key Outcome:** Higher quote-to-order conversion, faster response times, and more accurate, actionable order data.

Automate quote follow-ups

- Create reminders or rules so open quotes automatically get a follow-up after X days.
- Use templated “nudge” messages to make follow-up easy for reps.



How AI
can help:

Track open quotes and automatically trigger follow-up messages after a set timeframe.

Tag and route order-related conversations

- Decide on 3–5 tags (e.g., “New order,” “Backorder,” “Quote,” “Urgent job”).
- Use basic rules so messages tagged “urgent” surface quickly or route to a specific queue/team.



How AI
can help:

Automatically tag based on order intent, then route the conversation.

Link quotes to final orders

- Start tracking which quotes convert into orders (even if it’s a manual checkbox on a sheet at first).
- Use that data to see which customers, products, or reps create the most follow-through.



How AI
can help:

Automatically link quotes to resulting orders and track conversion.

Make SKU lookup faster and less tribal

- Centralize digital catalogs, price lists, or internal SKU cheat sheets in a single place.
- Create a simple process for looking up SKUs so new reps don’t slow the line and so things stay consistent.



How AI
can help:

Instantly surface the correct SKU, from a single search across catalogs

Walk KPIs to Watch:

- Quote-to-order conversion rate.
- % of order-related messages that are tagged/routed.

1. **Goal:** Now that you've cut work hours and eliminated errors, use that time to proactively drive more orders.
2. **Why Care:** Missing upsell and retention opportunities leave revenue on the table and slow growth.
3. **Key Outcome:** More proactive selling, higher order value, and better customer retention with minimal extra effort.

AI-powered SKU and add-on recommendations

- Use AI or rules to suggest common add-ons for certain SKUs (e.g., fittings, fasteners, accessories).
- Give reps a simple "If they buy X, ask about Y" checklist powered by your order history.



How AI can help: Analyze order history to suggest related SKUs or add-ons automatically, giving reps a "If they buy X, ask about Y" checklist.

Identify at-risk accounts and reach out

- Use order data to flag customers whose order frequency or volume has dropped.
- Generate a simple weekly "call/text list" of accounts to check in with.



How AI can help: Monitor order frequency and volume, flagging accounts that have lagging activity.

AI-assisted outreach

- Send outbound messages for quote follow-ups, win-back campaigns, or promos, while reps review/edit for tone.
- Focus on saving time on the "blank page," so reps can reach more customers.



How AI can help: Draft outbound messages for follow-ups, win-back campaigns, or promotions automatically.

Proactive campaign triggers

- Set up simple triggers:
 - "New product line" notify customers who have bought related SKUs.
 - "Seasonal change" notify customers who buy seasonal items.



How AI can help: Detect triggers and automatically enact the next step.

Run KPIs to Watch:

- Average order value (AOV).
- Revenue from add-ons / cross-sells (or % of orders with add-ons).
- Orders per active customer.

Crawl Worksheet | Phase 1 (Days 0–30)

- **Goal:** Audit your order process, choose official channels, and measure their effectiveness.
- **Why Care:** Reduce manual steps, speed responses, fewer errors.
- **Key Outcome:** Faster order capture, consistent communications.

Channel / Source: _____

Reason you use this channel

- ☐ Order notification
- ☐ Status checking etc. etc.
- ☐ Reason: _____

How does this hold your team up:

Channel / Source: _____

Reason you use this channel

- ☐ Order notification
- ☐ Status checking etc. etc.
- ☐ Reason: _____

How does this hold your team up:

Channel / Source: _____

Reason you use this channel

- ☐ Order notification
- ☐ Status checking etc. etc.
- ☐ Reason: _____

How does this hold your team up:

Pain Score (1–5, 5 = worst)

Channel: _____

Channel: _____

Channel: _____

Total Score: _____ /15

Biggest Breakdown/Notes: _____

Where is time lost most?

- | | |
|------------------------------------|---------------------------------|
| ☐ Intake | ☐ Pricing |
| ☐ Missing Info | ☐ ERP Entry |
| ☐ SKU Lookup | ☐ Approvals |
| ☐ Substitutes | ☐ Follow-up |

Crawl KPIs to Watch:

- Average time to acknowledge a new order or quote request.
- % of orders captured using the standard template.
- Time spent rekeying.

Walk Worksheet | Phase 2 (Days 31-60)

Goal: Build your workflow by designing templates and setting tags to use.

Decide how to label your contacts, so you can segment them appropriately.

- | | |
|---|---|
| ☐ Role (ex: Manager) | ☐ New Customer/Returning Customer |
| ☐ Industry (ex: Equipment) | ☐ Other: _____ |
| ☐ Decision Maker/Not Decision Maker | |

Sample follow-up templates

- 1. Open Quote Follow-Up:** Just checking in on the quote we sent for [Part | SKU | Job]. Do you have any questions or updates?
- 2. Pending Approval | Backorder Follow-Up:** Your order for [Part / SKU / Job] is pending approval / backordered. We'll update you as soon as it's ready. Let me know if you need alternatives.
- 3. Dormant | At-Risk Account Check-In:** We noticed it's been a while since your last order. Are there any products or projects we can help with this week?
- 4. Quote-to-Order Nudge:** Following up on the quote for [Part / SKU / Job]. We can reserve stock or schedule delivery once you're ready. Let me know how you'd like to proceed.
- 5. Post-Order Confirmation | Thank You:** Thanks for your order, [Customer Name]! We're processing [Part / SKU / Job] and will confirm shipment shortly. Reach out if you have any questions in the meantime.

Routing | Rules:

- ☐ Urgent
- ☐ Quote
- ☐ Back Order

Walk KPIs to Watch:

- Quote-to-order conversion rate.
- # of orders requiring rework or callbacks.
- % of order-related messages that are tagged/routed.

Run Worksheet | Phase 3 (Days 61–90)

Goal: Shift from reactive selling to proactively driving more orders.

Sample Proactive Messages | Broadcasts

1. **AI-Powered SKU | Add-On Suggestion:** *Based on your recent order of [Part/SKU], you might also need [Related SKU]. Can I add it to your order?*
2. **At-Risk Account Check-In:** *We noticed it's been a while since your last order. Are there any products or projects we can help with this week?*
3. **Win-Back | Follow-Up:** *Following up on your last quote for [Part/SKU]. We can reserve stock or schedule delivery when you're ready.*
4. **Proactive Campaign | Broadcast:** *We just launched [New Product Line | Seasonal Items]. Let me know if you want a list of items relevant to your orders.*

Proactive Selling Checklist:

- ☐ Suggest upsell/cross-sell based on previous purchases
- ☐ Check if it is an at-risk account
- ☐ Apply appropriate tags
- ☐ Opt-in for broadcasts if applicable
- ☐ Apply proactive triggers (new products, seasonal changes)
- ☐ Capture notes / next steps in the system

Run KPIs to Watch:

- Of upsell/cross-sell recommendations applied.
- Of at-risk accounts contacted/retained.
- % of proactive messages sent on time.
- Conversion rate from proactive recommendations.

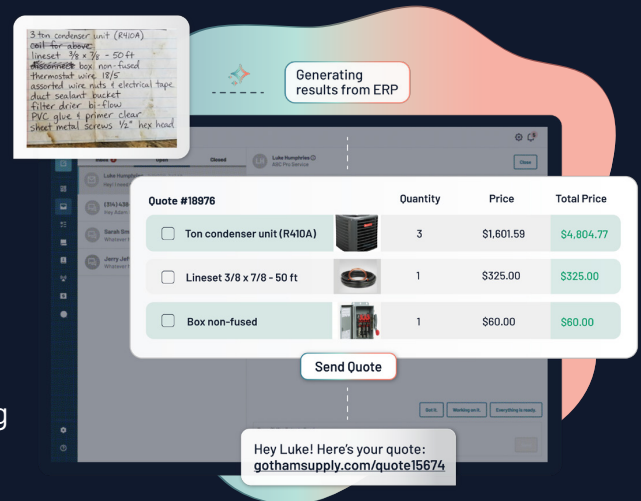
Take more orders faster with *AI-powered workflows*



Order Automation is Prokeep's AI engine that instantly turns customer orders from text, email, or image into send-ready quotes by connecting customer conversations to live inventory data in your ERP.

You are 50% more likely to win an order with *faster, more accurate quotes.*

Prokeep's Order Automation is built on a combination of AI, intuitive workflows, and the best possible API connection to your ERP. This unlocks stock availability, brand suggestions, customer pricing, and dynamic product search — empowering your reps to take orders and send quotes faster, giving them more time to drive more orders proactively.



Speed for *Purpose*

Create & Send
Accurate Quotes
Faster

Arm every rep
with veteran product
knowledge

Turn saved time
into new orders

Order Automation saves time - Prokeep turns that time into more orders.

With built-in tools for outreach, customer reactivation, and data-driven engagement, your team doesn't just process orders faster — they have the tools to drive more of them.

Simplify quotes and convert fragmented messages into connected, trackable data.

- ✓ Organized quotes connected to contacts
- ✓ Product and brand suggestions
- ✓ Product Specs from manufacturer numbers
- ✓ Quote building from images, voicemail, and more
- ✓ Multi-language translation
- ✓ In Stock and Price information
- ✓ Add-on suggestions

Right tech - Right Price

Other Order Automation providers jam AI into outdated ERPs, call it innovation, and charge a premium. Prokeep takes a different approach: AI and machine learning built for everyone, with pricing and packaging to match. **We're here to help distributors better serve their customers through end-to-end communication and best-in-class technology.**