



Find the busywork. Kill it in a week.

Automation Audit

Passyunk Roasting Co. — a Philadelphia coffee roaster & café

You're spending ~18 hours a week on manual work.

This plan recovers ~13.5 hours/week — about \$1,872/month of your time back.

You roast, run a café, and supply about a dozen wholesale accounts — and most of the glue between those is still manual: wholesale orders come in by text and email, invoices get typed one at a time, reorders happen when someone notices a bin is low, and reviews go unanswered. None of it is hard; all of it is repeated, and it eats the hours you'd rather spend roasting or growing accounts. The plan below turns the five most repeated jobs into automations — several of which can run privately on your own machine, no monthly software.

Where the time goes

The manual, repeatable work across your operation — mapped from your intake, grouped into five areas.

Wholesale orders & purchasing		6 hrs/wk
Invoicing & chasing payment		4 hrs/wk
Inventory & reorders		3 hrs/wk
Customer email & reviews		3 hrs/wk
Scheduling & weekly admin		2 hrs/wk

The plan — ranked by payoff

Every fix below is scoped to a real automation. Ranked by hours saved; the estimate uses a blended rate of \$32/hour.

THE FIX	TIME BACK	VALUE	EFFORT
1 Wholesale order intake → order + invoice draft Orders arriving by email/text land in one place and auto-create the order and a draft invoice — no re-typing, nothing missed. runs on your own machine · private	5 hrs/wk	~\$693/mo	Medium
2 Automatic invoicing + payment reminders An invoice goes out the moment an order is confirmed, and	3 hrs/wk	~\$416/mo	Low-Med

THE FIX	TIME BACK	VALUE	EFFORT
overdue accounts get a polite reminder on their own — you stop chasing.			
3 Reorder alerts on par levels Green coffee and retail stock get a threshold; when you dip below it, you get a ready-to-send reorder list. Ends the Friday scramble. runs on your own machine · private	2 hrs/wk	~\$277/mo	Low
4 Review follow-up + reply macros A quick ask after each wholesale delivery and café purchase, plus one-tap replies — more 5-star reviews, none left hanging.	2 hrs/wk	~\$277/mo	Low
5 Staff scheduling from a template A repeating schedule with auto-reminders to the team, so the week builds itself and shifts don't get missed.	1.5 hrs/wk	~\$208/mo	Low

Quick wins — do these this week

No project needed. Small changes you can make now for immediate relief.

- ▲ Set up five saved replies for your most common wholesale and café emails — 30 minutes today, ~1 hour/week back immediately.
- ▲ Write your par levels on one page and tape it by the green coffee — a stopgap until the reorder alerts are live.
- ▲ Turn on automatic payment reminders in the invoicing tool you already pay for — it's almost certainly switched off.

What's worth building next

The fixes with the biggest payoff — each a fixed-scope project. You only fund what this audit proves is worth it.

1 • The wholesale order-to-invoice automation

Your single biggest time sink and the cleanest win — a fixed-scope build that pays for itself in weeks. Start here.

2 • A private “reorder + inventory” assistant

Runs entirely on your own machine — your supplier prices and stock stay in-house, and there's no monthly software fee. The “run lean” option.

Optional • Upwield Monthly

Once the automations are live, keep them running and add one improvement a month — a flat monthly, pause anytime. For when you'd rather not think about it.

Ready to build the first one?

Pick the fix worth building — we scope it fixed-price, you approve, we build and hand it over. Reply to this report, or start at upwield.com. Prefer it stays in-house and private? Most of these can run entirely on your own machine — no monthly software fees.

Estimates are directional — actual time and value depend on your volumes and tools; we confirm scope before any build. Illustrative sample — a composite small business, details anonymized. Your report is built on your own intake. © Upwield, Philadelphia. Prepared for the named recipient; not for redistribution.