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Free sample
Reverse SaaS Vault

One complete playbook from the Vault, free, plus the full list of what's inside. for consultants, freelancers and small agencies who want to run AI-assisted workflows for small-business clients Doable yourself, no coding, no setup from us.

1 full playbook | 12 in the full Vault | £47 for the full Vault

lumin42.com/reverse-saas-vault

What's inside the full Vault

12 step-by-step playbooks and 22 copy-paste templates in a members web app. Tick steps off as you go; it remembers your progress on phone or computer.

Section	Playbook	Time
Design the outcome offer	**Reverse SaaS: sell the result, not the software**	45 minutes
Design the outcome offer	**Pick one customer type and one bottleneck**	2–3 hours (including 3 short conversations)
Design the outcome offer	**Write the outcome, inclusions and exclusions** (this sample)	1–2 hours
Design the outcome offer	**Price it: setup, monthly fee and usage**	2 hours
Build it safely	**Map the workflow from trigger to outcome**	1–2 hours
Build it safely	**Choose a delivery stack you can control**	2 hours
Build it safely	**Data protection and contracts, the basics**	2–3 hours
Build it safely	**Test it properly before it goes live**	2–4 hours
Build it safely	**Onboard a customer in one week**	Plan in 1 hour; runs over 5 working days
Win, prove and keep clients	**Run a paid pilot with written success criteria**	1 hour to write; pilot runs 30 days
Win, prove and keep clients	**Content that sells the outcome, honestly**	2 hours for a month of posts
Win, prove and keep clients	**Monthly evidence, renewals and the 30-day launch plan**	30 minutes a month per customer; 15 minutes a week for you

Sample playbook: Write the outcome, inclusions and exclusions

A one-page service definition: the outcome you'll work towards, what's included, what isn't, what always goes to a human, your hours and your support response.

Time	Cost	Level
1–2 hours	Free	Beginner

Why it matters

Most disputes in managed services come from assumptions nobody wrote down. A clear page of inclusions, exclusions and handoffs protects you and gives the customer confidence.

Tools

- The service definition template below

Steps

1. **State the outcome:** One sentence on what you'll aim to improve, in measurable words (from the bottleneck playbook).
2. **List what's included:** Channels (phone, web form, WhatsApp), integrations (their calendar, their CRM) and workflows. Be specific.
3. **List what's excluded:** Things a customer might assume: new website builds, extra channels, out-of-hours human support, content writing. Writing exclusions down is kinder than refusing later.
4. **Define the human handoff:** Which situations always go to a person (complaints, payments, anything sensitive or urgent), to whom, and how fast.
5. **Set hours, response times and limits:** Your support hours, how fast you'll reply to an issue, and any usage limits (minutes, messages) with what happens if they're exceeded.

Copy-paste templates

> **Service definition (one page):**
>
> Outcome we'll work towards: ___
> Included: channels ___ / integrations ___ / workflows ___
> Not included: ___
> Always goes to a person: ___ (to whom, how fast)
> Our support hours: ___ | Response to issues: within ___
> Usage included: ___ | If exceeded: ___
> What we need from you: ___

Done when

- Outcome sentence written
- Inclusions listed
- Exclusions listed
- Human handoff rules set
- Hours, response times and limits stated

Avoid these

- If something isn't written in, assume the customer thinks it is.
- Never let an AI handle complaints, payments or anything urgent without a human.

The 90-day quick start in the full Vault

1. Week 1: Write your one-paragraph service, pick one customer type and bottleneck, and talk to three owners.
2. Week 2: Write the service definition and price it with the calculator. Map one workflow.
3. Week 3: Choose your stack, get the data basics in place, build and test the workflow on test data.
4. Week 4: Post four honest posts with one real demo, run assessments and offer one paid 30-day pilot.
5. Month 2: Run the pilot, keep the weekly log, then hold the continue, revise or stop decision.
6. Every month: Send each customer a value review and keep your own weekly scorecard.

Get the full Reverse SaaS Vault
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