

PREPARED FOR

Maple & Rye Bakery

Portsmouth, New Hampshire · 4-person team



AI Inquiry & Quote Assistant Strategy

How to answer catering and custom-cake inquiries the same day with AI: the approach, costs and return, a step-by-step setup guide, ready-to-paste templates and a 30-day plan.

~7 hours saved per week

\$20/month in tools

~3 hours to set up

You approve every reply

CREATED BY

AI Optimist

DATE

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PLAN

Full Strategy · v1

01 · AT A GLANCE

Executive summary

Maple & Rye receives 15–25 catering and custom-cake inquiries a week across email and Instagram, and the owner spends about 10 hours a week collecting details before a quote can be written. This plan moves detail-gathering to a free order form, and uses Claude, connected to the bakery's Gmail, to draft complete quotes from the bakery's own price sheet. A person approves every reply before it goes out.

~7 hrs
saved per week (10 → about 3)

\$20/mo
total new tool cost

~3 hrs
one-time setup, done in week 1

Same day
quote target, down from 1–3 days

Area	Recommendation
Approach	Collect every quote detail up front, then have AI draft the quote and reply for approval
Tools	Google Forms (free) · Instagram Instant Reply via Meta Business Suite (free) · Claude Pro with the Gmail connector (about \$20/month)
Your role	Keep the price sheet current; review and send drafts in two short daily passes (about 15 minutes each)
Safeguards	Claude drafts but never sends without approval; flags rush orders, allergies and anything not on the price sheet
Goal at day 30	70% of inquiries arrive through the form, quotes go out the same day, inquiry time is under 3 hours a week

02 · YOUR QUESTION

The brief

“We get 15–25 catering and custom cake inquiries a week by email and Instagram. I spend about 10 hours a week going back and forth asking for dates, servings and flavors before I can even quote. Can AI handle the back-and-forth and get quotes out faster?”

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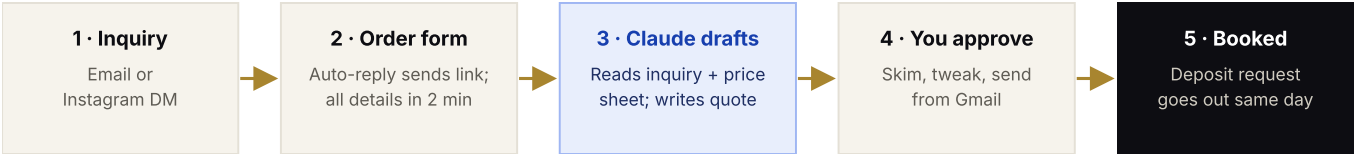
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03 · THE ANSWER

Yes, and you stay in control

In short: AI can take over almost all of the back-and-forth. The hours go into chasing missing details (date, servings, flavors, allergies, pickup or delivery), so the plan removes that step first and then lets AI write the quote.

How it works



Inquiries that skip the form go straight to step 3: Claude drafts a short reply asking only for the missing details.

- **Order form (Google Forms):** asks every question you'd otherwise ask by email, with dropdowns for sizes and flavors so answers arrive complete.
- **Instagram Instant Reply (Meta Business Suite):** every new DM conversation gets the form link automatically.
- **Claude Pro, Gmail connector and a Project:** a Claude Project holds your menu, prices and policies. Each morning and afternoon, Claude reads new inquiries in Gmail and saves a ready-to-send draft for each. Claude asks before sending anything.

04 · WHY THIS APPROACH

Three options compared

Option	Monthly cost	Quote quality	Setup	Control
Claude + Gmail + free form RECOMMENDED	~\$20	High: quotes from your own price sheet, in your voice	~3 hours	Full: you approve every reply
Website chatbot / auto-responder service	Varies, usually a monthly subscription	Medium: good for FAQs, weaker on custom quotes	Hours to days	Medium: replies send automatically
Part-time virtual assistant	Roughly \$400+ at typical part-time rates (estimate)	High once trained	1–2 weeks of training	High, but slower to respond

Why we recommend it: custom quotes need your prices and judgment, not canned answers. This setup costs the least, is live within a week, and keeps a person in charge of every reply that goes to a customer.

05 · COSTS AND RETURN

Your tool stack

Tool	What it does for you	Cost (USD)
Google Forms	Order form for catering and custom cakes; responses land in a Google Sheet	Free
Meta Business Suite	Instagram Instant Reply and Away Message with your form link	Free
Claude Pro	Project with your price sheet; Gmail connector to read inquiries and save drafts	~\$20/month
Total	Everything in this plan	~\$20/month

Estimated return

Hours on inquiries today	10 hrs/week
Hours after setup (two 15-min passes a day, plus calls)	~3 hrs/week
Time saved per month (7 hrs × 4.3 weeks)	~30 hrs
Value of that time at \$35/hour	~\$1,050
Tool cost	-\$20
Net monthly value	~\$1,030

THE BIGGER UPSIDE

Customers often book whoever replies first. If faster, same-day quotes win just **two extra orders a month** at a \$180 average, that's another **~\$360/month** in revenue.

Estimates based on your figures. Recalculate after 30 days with your real numbers.

06 · RISKS AND SAFEGUARDS

What could go wrong, and how this plan handles it

Risk	What it means	Safeguard built into this plan
Wrong price	Quote based on an outdated or incomplete price sheet	One price sheet, kept current. Anything not on it is flagged PRICE CHECK instead of guessed.
Allergy errors	Dietary needs missed or overpromised	Allergies are a required form question; Claude flags them ALLERGY and repeats only your kitchen policy.
Rush orders	Orders inside your lead time promised by mistake	Anything under 14 days is flagged RUSH and gets a "let me check" reply, not a quote.
Robotic tone	Replies lose your personal touch	Three of your real past replies serve as style examples; you read every draft.
Instagram gaps	Instant Reply only answers new conversations (500 characters max)	Form link also in your bio and a story highlight, plus a saved reply for past contacts.
Customer privacy	Customer emails pass through an AI tool	Never paste payment details; mention AI-assisted replies in your privacy notice.

07 • IMPLEMENTATION

Step-by-step setup

Steps 1–7 take about 3 hours in total and can be done in one afternoon. Templates referenced below are on pages 8–9.

Action	Detail	Time
01 Write your one-page price sheet	List cake sizes and servings, flavors, fillings, add-ons, delivery fees, deposit, lead times and allergy policy in one document. This is the single most important input: Claude's quotes are only as good as this sheet. ✓ Done when: every item you've quoted in the past 3 months has a price.	45 min
02 Build the order form	In Google Forms, create "Maple & Rye Catering & Custom Cakes" using the questions in Template C. Use dropdowns for sizes and flavors, make date, servings and allergies required, and turn on email notifications for new responses. ✓ Done when: a test submission arrives in your Gmail.	30 min
03 Share the form everywhere	Add the link to your Instagram bio, a "Order a cake" story highlight, your website, your Google Business Profile and your email signature. ✓ Done when: the link is in all five places.	15 min
04 Turn on Instagram Instant Reply	In Meta Business Suite, go to Inbox → Automations → Instant Reply, choose Instagram, paste Template B and switch it on (saving alone doesn't activate it). Set an Away Message for closed hours too. ✓ Done when: a friend's test DM receives the reply.	10 min
05 Set up Claude Pro and a Project	Subscribe to Claude Pro, create a Project called "Maple & Rye Quotes", paste Template A into the Project instructions, and upload your price sheet plus three real past replies you were happy with. ✓ Done when: asking the Project "What's a two-tier cake for 40?" returns your real price.	30 min
06 Connect Gmail and label inquiries	In Claude, connect the Gmail connector. In Gmail, create a filter that labels form notifications and messages containing "cake", "catering" or "order" as Catering . ✓ Done when: Claude can list this week's emails under the Catering label.	20 min
07 Run your first draft pass	In the Project, paste Template D. Claude reads new Catering emails, saves a Gmail draft for each and gives you a summary table. Open Gmail, review the drafts, edit, send. ✓ Done when: five real inquiries have approved replies.	20 min

Action	Detail	Time
08 Tune it with feedback	When you edit a draft, tell Claude why ("we never offer fondant under 30 servings"). Add each rule to the Project instructions so it sticks. ✓ Done when: most drafts need only light edits.	10 min/day, week 2
09 Set a twice-daily rhythm	Run Template D at 9am and 3pm. Block 15 minutes each time to send drafts. If your Claude plan offers scheduled tasks, schedule the 9am pass so drafts are waiting when you arrive. ✓ Done when: no inquiry waits more than half a day.	30 min/day
10 Measure and decide	At day 30, compare your numbers to the targets on page 7 and decide what to automate next (see Days 31–90). ✓ Done when: you've filled in the scorecard.	30 min

08 • TIMELINE

Your first 30 days

Targets are starting estimates. Adjust them once you see your real reply and booking rates.

Week	Focus and key activities	Milestone
Week 1 Days 1–7	Set up. Price sheet, order form, Instagram Instant Reply, Claude Project, Gmail connector and label (steps 1–7).	Form live everywhere; first 5 drafts approved
Week 2 Days 8–14	Pilot. Run the draft pass twice daily. Note every edit and add rules to the Project. Reply to non-form inquiries with Claude's "missing details" drafts.	Most drafts need only light edits
Week 3 Days 15–21	Expand. Add FAQs (delivery area, tastings, payment) to the Project. Push the form link harder: pin a post and update the website button.	60–70% of inquiries via the form; quotes out same day
Week 4 Days 22–30	Measure. Track the scorecard below. Schedule the morning pass if available. Ask two regular customers how replies feel.	Under 3 hours a week on inquiries; scorecard complete

YOUR DAILY ROUTINE AFTER WEEK 2

9:00 Run the draft pass → **9:05** review and send drafts (15 min) → **3:00** repeat. Calls, tastings and special requests stay with you.

09 • MEASURING SUCCESS

Your 30-day scorecard

Write down today's numbers first (your baseline), then check weekly. ON TRACK WATCH ACT

Measure	On track	Watch	Act	Baseline / Day 30
Time to first reply	Under 4 business hours	Same day	Next day or later	___ / ___
Inquiry to quote	Same day	1-2 days	Over 2 days	___ / ___
Inquiries via the form	Over 70%	40-70%	Under 40%	___ / ___
Drafts sent with light edits	Over 70%	40-70%	Under 40%	___ / ___
Quotes that become orders	Up from baseline	Flat	Down	___ / ___
Hours a week on inquiries	3 or fewer	3-5	Over 5	___ / ___

If a measure is in "Act": see Troubleshooting on page 10. The most common fixes are a more complete price sheet and more style examples.

10 • RESPONSIBILITIES

Who does what

Claude (AI assistant) ■ Reads new inquiries under the Catering label ■ Drafts quotes and replies from your price sheet ■ Asks customers only for missing details ■ Flags PRICE CHECK, ALLERGY and RUSH items ■ Summarizes each pass in a short table ■ Drafts follow-ups for quotes with no reply after 3 days	Maple & Rye team ■ Keeps the price sheet and policies current ■ Approves and sends every reply ■ Decides on flagged items and exceptions ■ Handles calls, tastings and design consultations ■ Takes deposits and confirms orders ■ Reviews the scorecard weekly
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THE ONE RULE THAT MATTERS MOST

Claude never sends anything on its own in this plan. By default, Claude asks for your approval before sending, replying or forwarding email. Keep it that way, so every customer message is one you've seen.

11 • TEMPLATES

Ready-to-paste templates

Replace anything in `[brackets]` with your details.

A • Claude Project instructions

Paste into Project → Instructions

You are the inquiry assistant for Maple & Rye Bakery in Portsmouth, NH. You draft replies to catering and custom-cake inquiries for the owner to approve. You never send anything yourself.

VOICE: warm, friendly, concise, like a neighborhood baker. Match the style of the example replies in this Project. Sign off as "[Dana], Maple & Rye".

QUOTING RULES

- Use ONLY prices from the price sheet in this Project. Show a line-item total.
- If anything requested isn't on the sheet, write PRICE CHECK at the top of the draft and leave that line blank for the owner. Never guess a price.
- Deposit: `[50%]` to confirm. Lead time: `[14 days]` for custom cakes.
- If the event is less than `[14 days]` away, write RUSH at the top and draft a "let me check our schedule" reply instead of a quote.
- Allergies: write ALLERGY at the top. Describe only what our kitchen policy says: `"[We can make nut-free recipes but our kitchen handles nuts]."` Never promise "allergen-free".
- If details are missing (date, servings, flavor, pickup or delivery, allergies), draft a short reply asking ONLY for what's missing and include the order form link: `[form link]`.

FORMAT: greeting with their name, one line of genuine enthusiasm about their event, the quote or questions, the next step (deposit link or reply), sign-off. Keep it under 150 words. Money in US dollars.

B • Instagram Instant Reply

Meta Business Suite → Inbox → Automations (max 500 characters)

Hi! Thanks so much for thinking of Maple & Rye. For catering and custom cakes, the fastest way to get a quote is our 2-minute order form: `[form link]`
We reply to every request within one business day, usually the same day.
Have a quick question instead? Just reply here and we'll get back to you.

About 300 characters, comfortably under Instagram's 500-character limit. Use the same text as a saved reply for existing followers.

C • Order form questions

Question	Type
Name, email, phone	Short answer · required
Event date	Date · required
What are you ordering?	Dropdown: custom cake / cupcakes / catering platters / dessert table
Number of guests	Number · required
Flavor and filling	Dropdowns from your menu + "other"
Design ideas or photos	Paragraph + file upload
Allergies or dietary needs	Checkboxes + "none" · required
Pickup or delivery (address)	Choice + short answer
Budget range	Dropdown: under \$100 / \$100–250 / \$250–500 / \$500+
How did you hear about us?	Dropdown (helps you track marketing)

D • Daily draft pass

Check my Gmail for emails under the label "Catering" from the last 24 hours that I haven't replied to.

For each one, follow the Project instructions and SAVE A GMAIL DRAFT reply. Do not send anything.

Then show me a table:

Customer	Event date	Request
Flags (PRICE CHECK / ALLERGY / RUSH)		
Draft status		

Also list any quotes I sent 3+ days ago with no reply, and draft a short, friendly follow-up for each.

E • Example: what a finished draft looks like

From a real-style form submission

Form: Jess Moreno · graduation party June 14 · 40 guests · two-tier lemon cake, raspberry filling · nut-free · delivery to Rye, NH (7 miles)

ALLERGY

Hi Jess,

Congratulations to your graduate! A lemon-raspberry cake is perfect for a June party. Here's your quote:

Two-tier lemon cake with raspberry filling (serves 35–45)	\$260.00
Nut-free recipe	Included
Delivery within 10 miles	\$25.00
Total	\$285.00

A 50% deposit of **\$142.50** holds your date: [\[deposit link\]](#). One note: we bake nut-free recipes, but our kitchen does handle nuts, so we can't guarantee a nut-free environment.

Can't wait to bake for you!

Dana, Maple & Rye

12 • TROUBLESHOOTING

If this happens, do this

If...	Then...
Drafts sound stiff or generic	Add 3–5 more of your best past replies to the Project and tell Claude which phrases you like.
A draft has the wrong price	Fix the price sheet first (it's almost always the cause), then tell Claude: "Re-read the price sheet before every quote."
Customers keep skipping the form	That's fine: Claude's "missing details" drafts handle them. Also move the form link to the first line of your bio.
Instagram reply isn't firing	It only answers brand-new conversations. Check it's switched on, and use the saved reply for people who've messaged before.
Too many drafts to review	Tighten the Gmail filter, and ask Claude to sort the summary table by event date so urgent orders come first.
A customer asks if they're talking to AI	Be honest: "I use an AI assistant to draft replies, and I read every one before it's sent."

13 • DAYS 31–90

Where to go next

Next upgrade	What it adds	Effort
Deposit payment links	A payment link (from the processor you already use) in every quote, so customers can book in one click	1 hour
Review requests	Claude drafts a thank-you and review request the day after each pickup	30 minutes
Seasonal FAQ	Holiday menus and order deadlines added to the Project each season	20 min/season
Monthly report	Claude summarizes inquiries, bookings and top requests from the form's Google Sheet	15 min/month

Next step

Block one afternoon this week for steps 1–7. Start with the price sheet: everything else depends on it. You can be sending AI-drafted quotes by the end of the day.

Prefer to have it set up for you? Get matched with a vetted AI specialist through AI Optimist.

aioptimist.co

This strategy was written with AI for planning and inspiration. It isn't legal, financial or professional advice, and figures are estimates based on the information provided, not guarantees. Tool features and prices change; confirm current details with each provider before purchasing. Maple & Rye Bakery is a fictional business used as a sample.