The Small Business AI Playbook

Ten places automation tends to earn its keep, a worksheet to help you decide what to try first, and a safety checklist to keep people in control of the result.

PART 1

Ten automation opportunities

Each of these is commonly implementable with no-code or low-code tools — configuration and connections, not custom-built software. Start with whichever matches something your team already does by hand.

01 Lead acknowledgment & routing

Send an instant acknowledgment when a form or call comes in, and route it to the right person or queue automatically.

TYPICAL TOOLS

A form or website automation platform (e.g. Zapier, Make) connected to your inbox, CRM, or team chat.

WHERE A HUMAN STAYS INVOLVED

A person still reviews and sends the substantive reply — the automation only acknowledges and routes.

02 Appointment scheduling & reminders

Let customers pick an open time themselves, then send automatic confirmations and reminders ahead of the appointment.

TYPICAL TOOLS

A scheduling tool (e.g. Calendly, Acuity, or your CRM's built-in booking page).

WHERE A HUMAN STAYS INVOLVED

Staff can still block time manually and override any booking before it's confirmed.

03 Invoice & receipt data entry

Pull vendor, amount, and due date off incoming invoices or receipts instead of retyping them into accounting software.

TYPICAL TOOLS

A document-parsing add-on for your accounting software, or a workflow tool that reads email attachments.

WHERE A HUMAN STAYS INVOLVED

Someone checks every extracted field before it's recorded — nothing posts unreviewed.

04 Review requests

Automatically ask a customer for a review a set amount of time after a job or purchase is marked complete.

TYPICAL TOOLS

A review-request feature built into your CRM, point-of-sale, or a dedicated review-management tool.

WHERE A HUMAN STAYS INVOLVED

You control the timing, wording, and which jobs qualify — and can exclude any customer at any time.

05 Common-question drafting

Draft answers to repeat questions (pricing, hours, availability, how something works) for a person to review and send.

TYPICAL TOOLS

A help-desk tool with AI drafting, or a simple assistant trained only on your own FAQ document.

WHERE A HUMAN STAYS INVOLVED

A person reviews and sends every drafted answer — the system never replies to a customer directly.

06 Document intake & filing

Automatically sort incoming contracts, applications, or forms into the right folder or system based on their content.

TYPICAL TOOLS

A workflow automation platform connected to your inbox, cloud storage, or document management system.

WHERE A HUMAN STAYS INVOLVED

Filing rules are visible and adjustable, and misfiled documents are easy to find and correct.

07 Follow-up sequences

Schedule automatic check-ins on quotes or proposals that haven't received a response after a set number of days.

TYPICAL TOOLS

Your CRM's built-in sequences, or an email automation platform.

WHERE A HUMAN STAYS INVOLVED

Staff can pause, edit, or take over any sequence for a specific customer at any time.

08 Internal knowledge search

Let staff ask a question and get pointed to the right internal policy, price sheet, or past decision instead of searching folders.

TYPICAL TOOLS

An internal search or assistant tool scoped only to your own approved documents.

WHERE A HUMAN STAYS INVOLVED

Access is limited to what you've approved for indexing, and answers link back to the source document.

09 Inventory & reorder alerts

Flag low stock or overdue reorders based on the data you already track, instead of relying on someone remembering to check.

TYPICAL TOOLS

Your existing inventory or point-of-sale system's alerting features, or a connected spreadsheet automation.

WHERE A HUMAN STAYS INVOLVED

A person still places every order — the system only raises the flag.

10 Meeting notes & recap drafting

Draft a summary and action items from a call or meeting for someone to review before it's shared or filed.

TYPICAL TOOLS

A meeting-notes or transcription tool with summarization built in.

WHERE A HUMAN STAYS INVOLVED

A person reviews the draft for accuracy before it's sent to anyone or saved as a record.

PART 2

Prioritization worksheet

There's no universal formula for what to automate first — it depends on your business. A reasonable rule of thumb: start with something that happens often, takes real time today, and carries low risk if a step is ever missed. Fill in your own estimates below; these are your judgment calls, not projections we can make without seeing your operation.

AUTOMATION OPPORTUNITY	FREQUENCY	TIME TODAY	SETUP (L/M/H)	RISK (L/M/H)	PRIORITY (1–10)
Lead acknowledgment & routing					
Appointment scheduling & reminders					
Invoice & receipt data entry					
Review requests					
Common-question drafting					
Document intake & filing					
Follow-up sequences					
Internal knowledge search					
Inventory & reorder alerts					
Meeting notes & recap drafting					
Something else specific to your business					

PART 3

Safety checklist before you turn anything on

Automation works best when a person stays responsible for the outcome. Walk through this list before any workflow above goes live for real customers.

- [ ] A person reviews and can override any automated message before it reaches a customer.
- [ ] You've tested the workflow on a handful of real cases before turning it on for everyone.
- [ ] Someone is responsible for periodically checking the automation's output, not just switching it on and forgetting it.
- [ ] Staff working alongside the automation have been shown how it works and what to watch for.
- [ ] You know exactly what customer data each tool touches, where it's stored, and who can access it.
- [ ] There's a documented manual fallback if the automation goes down or produces a bad result.
- [ ] Customers have a clear, easy way to reach a real person if the automated step doesn't help them.
- [ ] You've asked any vendor directly how they use, store, and secure your business and customer data.