CHECKLISTS AND GUIDES // WHERE TO LOOK

Where could AI make a difference in your business?

Written for owners and managers of small and medium businesses: four places to look first, and the questions that show whether each one is worth your time.

Travis's short version: AI isn't one thing to buy. It's a way of improving specific pieces of work. In a small or mid-sized business, most of the real value sits in four places, and you can test any of them cheaply before you commit.

Start with where your week goes

If you run a small or mid-sized business, you probably wear several hats: owner, sales team, bookkeeper and sometimes the IT help desk. AI is most useful when it lifts pieces of that load off you and your team. Look at your business through these four lenses and note anything that rings true.

Free up staff time

Reduce repetitive administration, data entry and document preparation.

What it can look like. Details pulled from emails and forms straight into your systems. Quotes, letters, reports and summaries drafted from a template and a few inputs. Routine reminders and follow-ups sent without anyone chasing. Incoming documents sorted and filed.

In a business like yours. A trades business where the office manager retypes job details from emails into the job system and builds each quote by hand. Capturing the details automatically and drafting the quote returns hours every week for customer calls and follow-up.

Ask yourself. Which task does someone on my team repeat most days, and would they be glad to hand it over?

Improve customer service

Respond faster, find information more easily and provide more consistent answers.

What it can look like. Quick, consistent replies to the questions you answer every week. Staff finding the right policy, price or past conversation in seconds. Enquiries routed to the right person with the context already attached. Draft replies for a person to check and send.

In a business like yours. A property management firm where "where is my repair up to?" calls fill the day. Automatic status updates and answers to the routine questions leave the team free to handle the exceptions, and every customer hears the same thing.

Ask yourself. What do customers ask us again and again, and how long do they wait for an answer today?

Strengthen decision-making

Turn scattered business information into useful insights for managers.

What it can look like. A weekly summary pulled together from your accounting, sales and job data, without the Friday-afternoon spreadsheet. Late jobs, slow payers and unusual patterns spotted earlier. Long documents, feedback and call notes boiled down to what a manager needs to know.

In a business like yours. A professional services firm where the managing director builds a monthly performance pack by hand from three systems. An automatic summary lands in the inbox on the first working day, with the unusual items flagged for a closer look.

Ask yourself. Which report or number do I wish I had every week, but nobody has the time to assemble?

Grow without adding unnecessary overhead

Improve workflows before committing to additional people, systems or software.

What it can look like. Fixing the handoffs and rework in a process before hiring to cope with it. Connecting the tools you already pay for instead of buying another. Letting volume grow without the routine work growing with it, so your people stay on work that needs judgement.

In a business like yours. A retailer heading into its busy season that would normally take on temporary admin staff. Tidying the order-to-invoice handoff first lets the existing team handle more volume, and the extra hires become a choice rather than a necessity.

Ask yourself. If our volume grew by a quarter next year, which part of the business would break first?

How to choose where to start

1. **List the jobs.** Write down the three or four tasks that take the most time or cause the most frustration. Ask your team, because they usually know.
2. **Test each one.** Is it repetitive? Is the information already in a system? What happens if the result is wrong, and who would catch it?
3. **Pick one with a visible payoff.** Choose something where a mistake is cheap to catch and the benefit is easy to measure, like hours saved or response time.
4. **Prove it small.** Try it on real work in a short, time-boxed test, measure it against how you do it today, then decide whether to build.

What owners usually ask

Question	Straight answer
Do I have to replace my systems?	Usually not. Good automation works with the tools you already use, and it's worth fixing the process before you buy anything new.
Will it replace my people?	The aim is to take routine work off them so they spend more time on judgement and relationships. Decide that intent up front and tell your team.
What does it cost to find out?	A small, time-boxed test at a fixed price tells you whether it works before you commit to a build.

The examples above are illustrative of the kind of work that is typically automated. Results depend on your processes and data.

Want to talk this through for your business?

Book a free 15-minute call. We'll look at your situation and give you a straight answer, with no jargon and no sales pitch.

Let's Chat

Opens the request form on our website. Free, no obligation.