✓ Small AI Wins

# 50 AI tools & workflows for small businesses

Fifty workflows from real small businesses, grouped by area — each with the tools, the difficulty and the result the source reports. Plus how to pick your first one and a one-page safety checklist.

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This guide is the condensed version of our directory. We picked 50 workflows that (1) come from a real, named business, (2) report a concrete result, and (3) can be done by a small team at beginner or intermediate level. Click any title to open the full playbook with steps and the original source.

## How to pick your first workflow

1. **Find the repeat.** List the five tasks you or your team do every week that feel like copy-paste.
2. **Pick the one with an existing 'answer key'** — help articles, templates, past proposals. AI is strongest when it can lean on your material.
3. **Start read-only.** Let AI draft, summarise or suggest. Keep sending, paying and publishing manual.
4. **Measure one number** for two weeks: minutes per task, response time or tickets resolved.
5. **Write down what you learned** and turn it into a prompt template your team can reuse.

## 💬 Customer support

**1** **Add an AI chat agent in front of a busy phone line**
Tidio Lyro AI · Beginner
The source reports 75% of inquiries automated and everyday chats turned into qualified leads. — Bella Santé

**2** **Offer support across time zones as a small manufacturer**
Tidio Lyro AI · Beginner
The source reports a 71% resolution rate and nearly 400 hours saved. — Tailfin

**3** **Help a tiny team and volunteers communicate across languages with AI**
Microsoft Copilot · Beginner
The source describes a multi-week care-package project being completed in under a day. — Agape Source (Orlando Welcome)

**4** **Resolve most customer questions with an AI chatbot as you add product lines**
Tidio Lyro · Beginner
The source reports a 70% AI resolution rate within weeks. — Jiffy.com

**5** **Run separate AI bots for problem-solving and sales**
Tidio Lyro · Beginner
The source reports a 99.64% resolution rate over 30 days. — Stormline

**6** **Let an AI chatbot answer and tag renovation enquiries**
Tidio Lyro · Beginner
The source reports the resolution rate rising from 42% to 69%. — Renovate Direct

**7** **Automate most rental support with an AI chatbot**
Tidio Lyro · Beginner
The source reports up to 85% of customer service automated and response time down from about 3 minutes to 6 seconds. — Suitor

**8** **Offer 24/7 support to customers who need help outside business hours**
Intercom Fin, Intercom Copilot · Intermediate
The source reports the AI resolving 30% of queries at first (later up to 65%), response times down 95%, and agents closing 31% more conversations a day with the AI assistant. — Hospitable

9 **Run one AI agent across chat, email and social messages**
Tidio Lyro AI · Intermediate
The source reports a 73% resolution rate and over 400 hours saved per month. — MattressNextDay

## 📞 Phone & bookings

10 **Let an AI receptionist book, move and cancel beauty appointments**
CallPad · Beginner
The source reports 20 hours of phone time taken off the team in 16 weeks. — Essence of Beauty

11 **Never miss a booking call when you work alone**
Smith.ai AI Receptionist · Beginner
The source reports a 100% booking rate from leads who engaged with the AI receptionist. — Native Physical Therapy

12 **Answer 35+ daily calls at a vet clinic with an AI receptionist**
Smith.ai AI Receptionist · Beginner
The source reports the clinic handling 35+ daily calls with accurate information gathering and instant summaries. — The Pet Pad

13 **Answer hours, policy and dietary questions automatically by phone**
Slang AI · Beginner
The source reports 60% of calls fully automated. — Red Rocks Cafe

14 **Organise inbound calls with summaries for a consulting and production firm**
Smith.ai · Beginner
The source reports a 60% increase in sales profit. — SummitPoint

15 **Use an AI phone agent to filter junk calls and answer the regulars' questions**
Slang AI · Beginner
The source reports 43 hours of labour saved (calculated at Illinois minimum wage) and robo/junk calls almost eliminated. — Lil Beaver Brewery

16 **Text back every missed salon call and let AI answer the first questions**
TrueLark, Phorest · Beginner
The source reports 1,188 new clients in a year who first booked through the AI, about 28 online bookings a week (17 after hours). — Mermaid Hair Extensions

17 **Trial an AI phone agent at a few locations before rolling it out**
Slang AI · Beginner
The source reports 245 calls handled and 20 hours saved in the first month across the trial sites. — PLNT Burger

18 **Let an AI agent help customers find a location and book an appointment**
Zendesk AI agents, Zendesk Knowledge · Intermediate
The source reports customer satisfaction rising from 44% to 97% after consolidating tools and deploying AI agents. — Liberty Tax

## 📈 Sales & leads

19 **Capture after-hours leads with AI-assisted live chat**
Smith.ai Live Chat (AI + humans) · Beginner
The owner says he got 20 new leads in the first week; three bought $1,000 products, paying for a year of the service. — ECU Repairs

20 **Put an AI product expert in the store aisle via QR code**
Chatbase · Beginner
The source reports the bot answered at about 90% of its later quality within an hour or two of setup. — Hy-Clor

21 **Get proposals to a 90% draft with AI**
Generative AI assistant · Beginner
The source reports proposals reaching a 90% complete draft, saving many hours of staff time. — Sonic Promos

22 **Use FAQ and greeting chatbots to lift online sales**
Tidio · Beginner
The source reports sales up 23% and 5x more leads per month. — Procosmet

23 **Respond to proposal requests much faster with an AI assistant**
Microsoft 365 Copilot · Beginner
The source reports proposal response time cut by 80% and an estimated $500,000 in programming services avoided. — ICG

24 **Use a chatbot with pre-chat questions to qualify property leads**
Tidio · Beginner
The source reports a 138% increase in leads and 59% shorter waiting times. — Endeksa

25 **Use AI behaviour signals to decide which old contacts to call today**
Ylopo, Follow Up Boss · Intermediate
The source reports over $6 million in transactions closed from the 30-day effort. — Livia Monteforte (agent)

26 **Follow up with free-trial users automatically using an AI agent**
HubSpot Prospecting Agent, ChatGPT (earlier) · Intermediate
The source reports a 52% engagement rate and a 150-seat deal sourced without manual rep involvement. — Pingman Tools

27 **Use an AI agent for fit questions that also converts shoppers**
Gorgias AI Agent · Intermediate
The source reports 54% of support automated and 19% of AI-assisted shopping conversations converting; the brand avoided expanding its outsourcing contract by at least $25k for the holidays. — Pepper

## ✍️ Marketing & content

28 **Cut first-draft time for marketing content in half**
Gemini for Google Workspace, Google Meet · Beginner
The source reports up to 50% less time on first drafts (about 20 work hours per month) and approval processes up to 40% shorter. — Big Tiny

29 **Build a simple 'where to find us' web page in one afternoon without coding**
ChatGPT (OpenAI) · Beginner
The source reports the locator was built in a single afternoon by a non-coder. — The Original Tamale Co.

30 **Use AI across sales sheets, marketing drafts and meeting notes in a 14-person company**
Gemini in Workspace · Beginner
The source reports 4–5 extra hours a week for the founder and several hours a week for sales and marketing staff. — Bison Coolers

31 **Build a content strategy and org chart with AI in minutes**
Gemini, Google Performance Max · Beginner
The source reports a full content strategy in ten minutes after months of putting it off. — Maine Fly Company

32 **Visualise new product ideas and patterns with AI before making them**
Gemini, Google Performance Max · Beginner
The source reports a 23% revenue increase over a year attributed to Google Ads (separate from design use). — Our Green House

33 **Plan farm newsletters and posts in minutes during the quiet season**
Gemini in Google Docs · Beginner
The source reports content work done in minutes rather than hours. — The Good Earth Farm

34 **Write social media posts and ads with AI to save an hour a day**
Generative AI assistant · Beginner
The source reports at least an hour a day saved on back-office tasks. — Jackie's Jams

35 **Draft emails and research blog posts with AI when typing is hard**
Gemini in Gmail · Beginner
The source reports going from about one blog post a month to one every week or two, plus near-daily social content. — Curb Free with Cory Lee

36 **Build client reports from live ad data by chatting with AI**
Claude (Anthropic), Supermetrics MCP · Intermediate
The source reports a 10-hour client report completed in 20 minutes. — Layer (via Supermetrics)

## 🧾 Finance & admin

37 **Let AI capture and code receipts before they reach the ledger**
Dext AI Assist · Beginner
The source reports about 25% of bookkeeping time saved (the firm's own estimate) and 300+ receipts processed in minutes. — BKB Accountants

38 **Let your business bank's AI agents handle payroll transfers and invoice drafts**
Qonto, Claude (Anthropic) · Beginner
The source cites Forrester's analysis that Qonto's customers spent up to 8 hours a month on financial admin, and reports transfers being sent 2x faster. — Qonto (for SMEs and freelancers)

39 **Draft workplace policies quickly, then have a professional check them**
ChatGPT · Beginner
The source reports a required procedure drafted in about 30 seconds, and a policy approved unchanged by an outside HR firm. — Ted Taylor (Schlotzsky's & Cinnabon franchisee)

40 **Ask AI to explain other people's spreadsheet formulas in plain language**
Gemini in Google Sheets, NotebookLM · Beginner
The source reports 30% of e-commerce sales came from Google Ads in the last year (separate from the spreadsheet use). — Runamok

41 **Reconcile cash against bank deposits in minutes**
ChatGPT Work · Beginner
The source reports monthly reconciliation falling from 3 hours to 5–10 minutes (–94%) and 4 hours saved per payroll run. — Ted Taylor (Schlotzsky's & Cinnabon franchisee)

42 **Start a bookkeeping practice with automated document capture from day one**
Dext · Beginner
The source reports 3x growth since automating the admin; batches of 400 receipts are now captured as they arrive. — Gravitate Accounting

43 **Automate bill entry and transaction coding in a bookkeeping firm**
Docyt · Intermediate
The source reports 25 hours a week saved on bill entry and 10–15 hours a week less spent reviewing work. — J M Keehn

44 **Automate month-end verification and draft report commentary with AI**
Aider (Karbon), Xero · Intermediate
The source reports period-close labour down 66%. — 542 Partners

45 **Reprice a restaurant menu with AI analysis**
ChatGPT Work · Intermediate
The source reports pricing analysis cut from 5 days to 1–2 hours (–95%). — Ted Taylor (Schlotzsky's & Cinnabon franchisee)

## 📦 Operations & inventory

46 **Use an AI notetaker to speed up follow-ups after client calls**
Calendly Notetaker · Beginner
The source reports about 30 minutes a day saved on follow-ups. — Allenatore Coaching

47 **Find and summarise feedback buried in months of email**
Microsoft Copilot · Beginner
The source reports a two-hour job done in about 15 minutes. — The Rider Firm

48 **Speak your process aloud and turn it into SOPs with AI**
Gemini, NotebookLM · Beginner
The source reports 60–70% of the CEO's time freed up and revenue up 30% (not solely due to AI). — Select Auto Parts & Sales

49 **Collect CVs and answer candidate questions 24/7 with a chatbot**
Tidio Lyro AI, Tidio chatbots · Beginner
The source reports 90% customer-service automation and a large number of new CVs each day that would not otherwise have been collected. — Gecko Hospitality

50 **Halve editing time with an AI editor after a bad outsourcing experience**

Imagen AI · Beginner

The source reports editing time cut in half and edits '90% of the way there'. — Rachelle Welling Photography

## Tools that appear most often

| Tool family | Cases | Typically used for |
|---|---|---|
| ChatGPT | 30 | General assistant: drafting, analysis, files, scheduled tasks |
| Gemini | 29 | AI inside Google Workspace (Gmail, Docs) |
| Tidio | 24 | Website chat with AI agent (Lyro) and flows |
| Claude | 9 | General assistant: writing, analysis, research |
| Heidi Health | 9 | AI medical scribe for clinical notes and letters |
| Zapier | 8 | No-code automations that connect apps and AI steps |
| Gorgias | 8 | E-commerce helpdesk with AI agent |
| Smith.ai | 8 | AI receptionist with human backup |
| Slang AI | 8 | AI phone agent for restaurants, books into reservation systems |
| Intercom | 7 | Support platform with AI agent (Fin) |
| Shopify | 6 | E-commerce platform (data source) |
| Microsoft Copilot | 6 | AI inside Microsoft 365 (Word, Outlook, Excel) |
| Chatbase | 6 | Build an AI chat agent from your own content |
| Lindy | 6 | No-code AI assistants/agents for admin and documents |
| Any AI assistant | 5 | Any general-purpose AI assistant |
| Google Performance Max | 5 | Google Ads campaigns with AI-generated assets and targeting |
| NotebookLM | 4 | Ask questions of your own documents, with citations |
| HubSpot | 3 | CRM with AI prospecting and assistant |
| Freed | 3 | AI scribe and AI front desk for small clinics |
| Dext | 3 | Receipt and invoice capture with AI extraction |
| Karbon | 3 | Practice management for accounting firms, with AI email help |
| Imagen AI | 3 | AI photo editing that learns your Lightroom style |
| Zendesk | 2 | Helpdesk with AI agents and knowledge base |
| Voiceflow | 2 | Build custom chat/voice agents |
| Calendly | 2 | Scheduling with AI meeting notes |
| TrueLark | 2 | AI receptionist and texting for salons and spas |
| Zanda BizzyAI | 2 | AI notes inside Zanda practice software |
| ServiceTitan AI | 2 | AI call/booking agent inside ServiceTitan for trades |

| Tool family | Cases | Typically used for |
|---|---|---|
| Netic | 2 | AI call and booking agent for home-service firms |
| Ylopo | 2 | AI lead nurture by text for real estate agents |
| Aftershoot | 2 | AI culling and editing for photographers |

## One-page safety checklist (GDPR-friendly)

- Use business plans that don't train on your data, and sign the data processing agreement (DPA).
- Don't paste health, financial or HR details about people into AI tools without a legal basis.
- Tell customers when they're talking to an AI and offer a human.
- Ask for consent before recording or transcribing calls and meetings.
- Never let AI send, pay, publish or promise prices without human approval.
- Check every number, name, quote and legal reference before it leaves the building.
- Keep a simple log of which AI tools you use and for what.

Results are as reported by the source and have not been independently verified. Steps are our own suggestions. We are not affiliated with the vendors named and earn nothing from these links.

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