

The 5 Step AI Roadmap for Small Businesses

Most advice about AI for small business is written by people who have never run one. This is not that. It is the order I actually work in when somebody asks me to help, written so you can do it yourself if you would rather.

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Before you start. AI is not the point. The point is the hour you get back on a Tuesday, or the enquiry you stop losing at ten at night. If you remember nothing else, remember that. It is what every step below is aimed at.

Step 1. Find the job that is actually eating your week

Not the job you find most annoying. The one that costs you the most time, which is usually duller and less obvious. For one week, keep a note every time you do something you have clearly done before. Same message typed again. Same figures copied from one place to another. Same question answered for the fortieth time.

At the end of the week you will have a list. Put a rough number of minutes next to each one and multiply by how often it happens. The winner is almost never what you expected.

What good looks like

One sentence you could say out loud. "I spend about four hours a week writing quotes." If you cannot put a number on it, you are not ready to fix it yet.

The mistake most people make

Starting with the technology. Asking which tool to buy before knowing which job you are buying it for is how people end up paying a monthly fee for something nobody opens.

Step 2. Check the job is worth automating at all

This is the step everybody skips, including most consultants, because it is the step where the honest answer is sometimes no.

Take the hours a week from step one and multiply by 48. That is the yearly cost in your time. Now put a value on an hour of your time, whatever feels honest. If the job costs you an hour a month, automating it saves twelve hours a year, and almost nothing is worth building for that.

The threshold I use. If a job takes under two hours a month, do it yourself and stop reading this section. Between two and five hours a month, it is borderline and depends on how much you hate it. Above five hours a month, it is nearly always worth fixing.

There is a second thing worth automating even when the hours are small: anything you are losing money on without knowing. Enquiries that arrive at night and get answered on Tuesday. Quotes that go out too slowly. Follow ups nobody remembers. These are worth fixing at almost any volume, because the cost is invisible and therefore never gets counted. So before you skip a job with small hours, ask yourself the honest question: is this one quietly costing me money every week? If it is, it gets a second look even if the number of minutes is small.

Step 3. Write down what the fix has to do, in plain English

Before anything gets built, you should be able to describe the finished thing in about four sentences, with no technology mentioned at all.

Here is a real example in the shape I mean. "When an enquiry comes in through any of my three channels, it lands in one place. It gets an immediate reply answering the five things people always ask. If it is a real job, I get a message with the details already gathered. If it is not, I never see it."

That is a specification. Anybody competent could build to it, and more importantly, you can tell afterwards whether it worked. If you cannot write those sentences, nobody can build you the right thing, and you will not know whether what they delivered was any good.

Include what it must never do

Just as important and almost always forgotten. "It must never quote a price." "It must never promise a date." "It must never sound like a robot pretending to be me." Write those down too.

Step 4. Build the smallest version that is genuinely useful

Not a trial. Not a pilot. The smallest thing that does a real job on real work, used for real from the first week.

The reason is simple. Every plan is wrong in ways nobody can predict from a meeting. You find out what is actually wrong with it in about four days of real use, and almost never before. So the goal is to reach real use quickly and cheaply, then change it, rather than to plan for a month and get it right first time. You will not get it right first time. Nobody does.

What this costs, honestly

A simple automated workflow, connecting a few things you already use, is usually £500 to £2,000. A custom AI tool built properly around one bottleneck is £2,500 to £8,000. On top of that, the software it runs on is normally tens of pounds a month rather than hundreds.

If somebody quotes you five figures for a single automated email, you are paying for their office. And if anyone is vague about the monthly running cost, that is the most reliable warning sign there is.

Step 5. Check it in six weeks, and be willing to kill it

Put a date in the diary now. Six weeks after it goes live, sit down and ask one question. Am I actually doing less of that job than I was?

A surprising number of automations get quietly abandoned in week three. Everybody involved knows it and nobody says it, because admitting it feels like admitting the money was wasted. It was wasted either way. Saying so just stops you spending more.

The only measure that counts. Not how clever it is. Not how much time it theoretically saves. Whether you are still using it in six weeks, and whether the job it replaced has actually stopped landing on you.

Where most small businesses should actually start

If you want the short version and you trust me on the rest, these are the three that pay back fastest for almost every small business I work with.

Answering enquiries out of hours

Most enquiries arrive when you are not working. The business that replies first usually wins the job, and it is very rarely the one that replies on Tuesday morning.

Quotes and estimates

You already have the prices and the format in your head. Getting them out of your head and into something that writes the quote from job details is the single most common fix I build.

The follow up nobody sends

The quote that never got chased. The customer who has not been back in a year. This is money you have already earned the right to and simply do not collect.

If you would rather not do it yourself

This is genuinely doable on your own. Plenty of people read something like this, sit down for an afternoon and get most of the way there, and if that is you then take it and keep your money.

If you would rather someone else did it, that is what I do. I look at how the business actually runs, find the part that is slow or quietly losing money, build the thing that fixes it, and stay involved long enough to know whether it worked. You deal with me the whole way through. There is no account manager and nobody two years into their career doing the work.

I will also tell you when you do not need to spend the money. That has cost me work before. It has also meant the people who do work with me tend to stay.

A free 20 minute call. Tell me what is slow, or what is quietly costing you money. I will tell you honestly whether there is something worth building and roughly what it would cost. If the answer is that you do not need me, I will say that instead.

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AI TOOLS FOR SMALL BUSINESS

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