SALESEDGE FIELD GUIDE / ENGLISH EDITION

AI FOR SMALL BUSINESSES

Twelve processes to improve, test and automate selectively.

READ / APPLY / REVIEW

Complete English guide + editable source text.

Individual personal and professional use.

FIELD GUIDE / ENGLISH EDITION

AI FOR SMALL BUSINESSES

Choose from twelve practical business pilots with inputs, human review and verification criteria.

START WITH A PROCESS YOU CAN VERIFY

This guide describes twelve practical uses of AI in a small business. Each begins with an operational problem and ends with a check. Some can start as a manually reviewed draft; others require integration work, permissions and a technical owner before automation is appropriate.

The guide is not a collection of installed workflows. It does not include software, subscriptions, API credits or a guarantee of lower costs. Use approved tools and accounts, and check provider features and charges before connecting systems. A consumer chat account is not automatically an email, CRM or messaging integration.

For every pilot, define the input, output, responsible person, acceptance checks and exception route. Use synthetic data first. Compare the complete process with the previous method, including preparation, correction, review and any provider costs. Extend it only when the evidence supports doing so.

1. FIRST-LINE CUSTOMER SUPPORT

Problem. Similar questions receive inconsistent answers, and staff repeatedly search for the same information.

Pilot. Select a manageable set of frequent questions from permitted support records. Remove unnecessary customer details. Write and approve the current answer to each question, with an owner and review date. Include issues the assistant must escalate rather than answer.

Give the model the approved knowledge base and ask it to draft a response with the supporting source. State that an unsupported answer must be marked for review. Test ordinary questions, ambiguous wording, an outdated assumption and a request outside the knowledge base.

Start in draft mode. A reviewer checks accuracy and whether escalation happened correctly. Only consider automatic replies for a narrowly defined category after the business has approved the data access, sending permissions, monitoring and fallback. Keep a clear route to a person.

Check. Measure correct answers, unsupported claims, missed escalations, review time and actual resolution. A fast reply is not necessarily a solved problem.

2. EMAIL TRIAGE AND DRAFTING

Problem. Messages arrive without a consistent next action, and routine replies are rewritten from scratch.