

SMALL BUSINESS BIG AI

FREE OPERATOR GUIDE + WORKSHEET

How Should Small Businesses Decide Where to Use AI First?

A practical decision lens for operators who want leverage, not noise.

With Kim Lewis Howard

The Process, Power, and Profit of Intelligence.

THE OPERATOR'S DECISION GUIDE

Start Here

Most operators don't fail at AI because they pick the wrong tool. They fail because they never make a real decision — they sample a few apps, run an experiment, and quietly drift back to how things already worked.

The first AI decision isn't really about AI. It's about where your business is leaking time, clarity, and momentum — and whether you'll point a capable tool at the leak instead of at whatever's trending this week. A good first decision compounds. A bad one burns hours and confirms the quiet suspicion that this is all hype.

THE SHORT ANSWER

Use AI first where it improves clarity, removes repeated friction, strengthens a system, or protects your time — without weakening judgment. Don't start with the flashiest tool. Start where the same problem keeps showing up.

The Five Places to Look First

For most small businesses, the strongest first use cases cluster here — repetitive, full of friction, and rarely where owners think to look first.

1	Intake & lead follow-up. Leads go cold when follow-up is slow. Draft fast, personalized responses; let nothing slip.
2	Customer communication. Routine questions and first-draft replies, prepared for you to review and send.
3	Internal knowledge & SOPs. Turn tribal knowledge into searchable documentation so the business runs on systems, not memory.
4	Scheduling & handoffs. Close the gaps between steps where work gets dropped.
5	Reporting & decision support. Pull and summarize what changed and why, so decisions run on a clear picture.

THE SCORING MODEL

The SBBA First-Use Filter

Take any candidate and score it 1–5 on each criterion. A higher total means a stronger first use case. The winner is usually unglamorous — and exactly right.

Criterion	Ask yourself	Score high when...
Repetition	Does this happen often?	It's daily or weekly recurring work
Friction	Does it slow the business down?	There's a visible, recurring bottleneck
Clarity	Would better information improve the decision?	You're currently flying partly blind
Risk	Could automation cause harm if unchecked?	Risk is LOW and easy to reverse
Leverage	Would fixing this free meaningful time?	It gives hours back every week

Note: Risk scores in reverse — a HIGH score means LOW risk. Add the five numbers; the highest total is where you start.

What Should Stay Human

Knowing where AI doesn't belong matters as much as knowing where it does. Some things are the business — and they stay with you.

Judgment. Weighing trade-offs when the answer isn't obvious.	Relationship. The trust a customer places in a real person.
Ethics. The call about what's right, not just efficient.	Negotiation. The read of the room, the leverage, the timing.
Trust. Earned slowly, lost fast — never delegated.	Accountability. When it goes wrong, “the AI did it” won't stand.

AI prepares. You decide. That line is the whole game.

30 MINUTES, ONE DECISION

The Worksheet

Minutes 0–10 — List the friction. Write five tasks or processes that repeat often and slow you or your team down. Don't filter for “AI-ready.” Just name the drag.

Minutes 10–25 — Score each one on the five criteria. Remember: for Risk, a high score means LOW risk.

Candidate	Rep.	Fric.	Clar.	Risk*	Lev.	Total
1.						
2.						
3.						
4.						
5.						

**Risk: a HIGH score means LOW risk (easy to catch and reverse).*

Minutes 25–30 — Decide. Circle your highest total. Sanity-check it: if the AI gets this wrong, can I catch and fix it easily? If yes, you have your starting point.

The first AI use case we will test is:

One use case. Not five. Expand once the first one earns it.

BEFORE YOU AUTOMATE

Readiness Checklist

Confirm each of these before you point a tool at the process.

- The process is clearly defined — I could explain the steps to a new hire.

- It repeats often enough that a small improvement compounds.

- Better or faster information would genuinely improve the outcome.

- There's a human review step before anything reaches a customer, money, or reputation.

- If the AI gets it wrong, the error is easy to catch and reverse.

- Solving it frees meaningful operator time — not marginal minutes.

- Judgment, relationships, ethics, negotiation, trust, and accountability stay human.

- I picked ONE metric to measure before and after (response time, leads, hours saved).

What Not to Automate (Yet)

A broken or undefined process — fix it first; automation amplifies whatever you point it at. Anything high-stakes and hard to reverse before you've built confidence on low-risk work. And never the final decision itself.

PUT IT TO WORK

Your Final Action Plan

- 1** Choose one. Use the worksheet to select a single first use case — likely lead follow-up, customer communication, internal SOPs, scheduling, or reporting.
- 2** Clean before you automate. Make sure the underlying process is clear. Automation amplifies whatever you point it at.
- 3** Keep a review step. AI drafts and surfaces; you review and decide.
- 4** Set one metric. Pick the number that tells you it's working — before you start.
- 5** Test for 2–4 weeks. Let the metric move under normal conditions before adding anything new.
- 6** Let results earn the next step. One working system beats five half-running experiments.

KEEP GOING

Strategy before tools. Business first.

Small Business Big AI, with Kim Lewis Howard, helps operators think more clearly about business — using AI as leverage, not noise. Listen in, and explore the IMPACT Framework to turn one clear decision into a repeatable system.

