

O P E R A T O R G U I D E

AI Agents for Small Business

An AI agent is software that takes a goal and acts across tools on its own. It is not a chatbot. A chatbot answers. An automation follows a fixed path. An agent decides the next step and does it.

01 The difference

Chatbot: Answers questions. Does not decide. Example: FAQ bot.

Automation: Follows a fixed path. Decides only what you set. Example: form to email.

Agent: Takes a goal and acts. Decides within limits. Example: intake to follow-up.

02 What they can do

- ☐ Take an intake form and create the follow-up task.
- ☐ Pull the numbers and send the weekly report.
- ☐ Check the inbox and draft the replies that follow a rule.
- ☐ Move data from one system to another when a status changes.
- ☐ Flag the exceptions so a person only sees what needs a decision.
- ☐ Keep the process moving when no one is watching it.

03 What they cannot do

They cannot replace judgment. They cannot handle the exception that has never happened before. They cannot decide what the business should do next. They do the repeatable work so the people can do the work that needs a person.

04 Where to start

Pick one process that is already written down. The steps are clear. The decision in the middle is rare. That is the one to hand to an agent. Do not start with the process that still lives in someone's head.

If the process still lives in someone's head, write it down first. An agent cannot run what is not written.

05 What to do next

Write down one process that happens the same way every time. If the steps are clear, an agent can run it. If they are not, write them first.