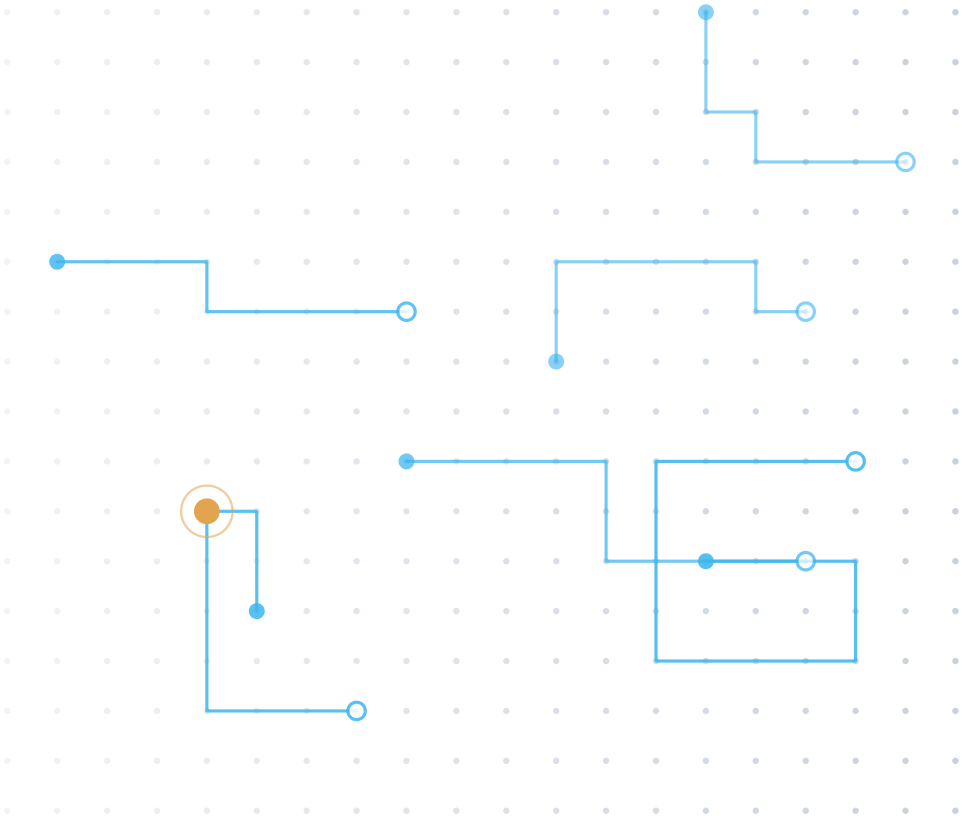


PRACTICAL GUIDE

10 questions to ask before automating your business with AI

Decide in one afternoon which task to automate first, how risky it is and what kind of pilot fits.

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FOR
Small business owners who want to start with AI without wasting money

READING
8 min

EDITION
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BEFORE YOU START

What you will get from this guide

01 Pick a single task and count it with the numbers from a real week.

02 Know where your data lives and which parts the AI should never see.

03 Work out what a mistake costs before you let the machine act.

04 Give each block a colour and know which pilot fits you.

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01

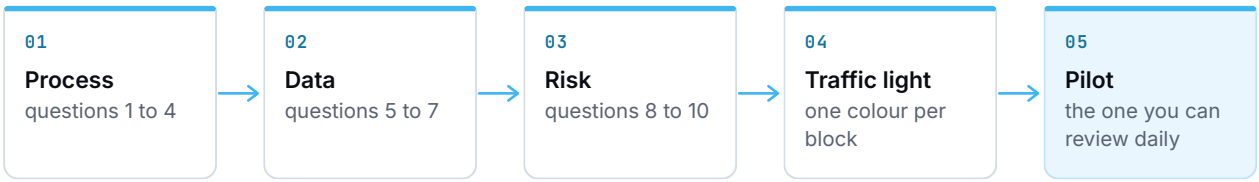
Why most automations fail before they start

When an AI project goes wrong in a small business, the model is rarely to blame. It fails earlier, on questions nobody asked: how many times a month the task happened, how many places the data was spread across, or what would happen if the answer came out wrong.
I see this often in the diagnosis call. The owner arrives with a tool already chosen. I ask first what is costing them time or customers; then we look at whether AI has any part to play. Sometimes it has none, and a well-made template solves the problem.

Asking what you can automate does not help much either, because almost anything can be automated. The useful question is what you should automate. Every task on the list has to lead back to something that is holding your business back today: calls nobody picks up, paperwork at the end of the day or appointments that slip away. If you cannot say which problem a task removes, it comes off the list.

This guide gives you ten questions to answer before you spend any money. They come in three blocks, and one afternoon is enough to answer them, ideally with the person who does the task today:

FIGURE 1 **From ten questions to a pilot**



02

Block 1: the process

Start with the task and leave the technology for later. Pick one, and make it specific: "customer service" is too broad, while "replying to people who ask for prices on WhatsApp" is already a task.
Question 1. Which exact task do you want off your plate? Describe it in one sentence with a verb: reply, book, summarise, sort.

Question 2. How often does it happen and how long does it take? Count it for one week. "A lot" does not count; "40 messages, 3 minutes each" does. If you cannot answer with a number, your first step is a week of counting, and automation comes after that.

Question 3. Who does it today, and how do they know it is done well? If that person cannot explain what a good answer looks like, the machine will not know either. Ask them for a handful of their own replies that they consider good, because those become your model answers.

Question 4. Which number in your business should improve? Just one, measured before you start, or you will never know whether it worked. There is a common trap here: measuring only the hours saved. Hours are useful for counting, but what the business feels shows up in the diary or the till, as confirmed appointments, customers served or monthly income. Two free hours a week are worth whatever you do with them.

> **EXAMPLE**
>
> Before the first question I sometimes run the double test. If twice as many customers came in tomorrow, what would break first? In a hair salon it is usually the phone, because nobody answers a call with scissors in their hand. If what runs out is chairs or staff, AI will not fix it. If what breaks is the phone or the paperwork, there is a task worth counting.

IN ONE LINE

One task, counted, with one business number to improve: without that there is no project.

03

Block 2: the data

AI is only as good as the information it can reach. And every piece of data you hand it is one more thing you have to protect, so this block is about tidying up before you connect anything.

Question 5. Where does the information the task needs live? In the calendar, in spreadsheets, in email or in someone's head. If it lives in someone's head, it first has to be written down in a simple document. It is the dullest step, and it pays off most.

Question 6. Is customer personal data involved? Names, phone numbers, health, children, payments. The more sensitive the data, the more careful the pilot has to be. In a clinic, for example, a patient's history has no reason to pass through a tool that only sends appointment reminders.

Question 7. Who can see that data today, and who could see it tomorrow? Think of a new member of staff on their first day. If the automation gives access to something that person would not see, the access is set up wrong.

> ✦ RULE
>
> If the AI must not see a piece of data, do not give it that data. An instruction such as "don't mention it" protects nothing; a folder or a key without permission does.

Very often the improvement that pays most is sorting out where the information lives and who can reach it, with the same model you already had.

IN ONE LINE

Fix access to the data before you ask the model for anything.

04

Block 3: the risk

Every automation will get something wrong sooner or later. What you need to know is what a failure costs and whether you will find out in time.
Question 8. What happens if the answer is wrong? A draft with a typo is one thing. An appointment confirmed for a time when you are closed is another, and a customer charged twice is worse still.

Question 9. Can it be undone? A sent message cannot be called back; an unsent draft can. That is why anything without a way back always starts as a draft.

Question 10. Who will notice if it stops working? Write down a name. If the automation stops on a Tuesday and nobody notices until Friday, the failure is one of organisation: nobody was in charge.

There is one more question without a number, because only you can answer it: which contacts do you want to keep making in person? The call to tell a customer that the repair will cost more than expected, or the message to a regular who has not been in for a month, build a kind of trust you should not hand to a machine, even if you could.

If you set what a mistake costs against what the task saves, you can see where to start:

FIGURE 2 **What to automate first**

TIME SAVED ↓ / COST OF A MISTAKE →	CHEAP MISTAKE	COSTLY MISTAKE
SAVES A LOT	**Start here** prices, opening hours, is my car ready?	**Drafts only** confirming or moving appointments
SAVES LITTLE	**If time allows** internal weekly summaries	**A person decides** payments, complaints and refunds

> *If a mistake cannot be undone, the machine drafts and a person decides.*
>
> HOW I WORK AT FLOWARA AI

05 The traffic light: which pilot fits you

Give each block a colour based on your answers. Green if the answers are clear and the risk is low. Amber if you have doubts or there is sensitive data. Red if you cannot answer, or the mistake cannot be undone.

YOUR RESULT	RECOMMENDED PILOT	WHAT THE AI DOES
Red **in any block**	Get organised first	Nothing yet: count, write down, tidy the data
Amber **on data or risk**	Drafts only	Drafts; a person reviews and sends
Green **throughout, or** Amber **only on process**	Assisted	Sends routine replies; anything unclear goes to a person
Green **after weeks of testing**	Autonomous per task type	Sends one specific type, always monitored

A red only means that the first job is getting organised: counting the task for a week, writing down what lives in someone's head and removing data you do not need. It is cheap work, and nearly always needed.

Autonomy is not handed to "the AI" in one go either. It is earned per type of task, with tests. First come reviewed drafts for a few weeks; then real cases run again and again to see how many come out right; and only then does that one type of message go out automatically. If a type starts failing, only that type goes back to human review, and everything else carries on.

> ✦ KEY
>
> The pilot that fits you is the one you can review every day. If you do not have a little time each day to look at it, start with something smaller.

06

Example: a car repair garage

A typical case, with realistic numbers (synthetic example): a neighbourhood garage gets messages every day asking whether a car is ready.

FIGURE 3 **One week counted at the garage**

60	2 min	2 h
messages asking about a car	per message, interrupting a job	of interruptions per week

Source: one week of counting (synthetic example)

Process Green. The task is answering "is my car ready?". One week of counting gives about 60 messages of 2 minutes each, almost always interrupting a job, and the workshop manager answers them. The number to bring down is interruptions per week. What the garage really wants is those two hours back on the cars, which is the work customers pay for.

Data Amber. The status of each car is on a whiteboard and in the manager's head, along with number plates and phone numbers. First it has to move to a simple sheet that is updated with every job. Code finds the car from the phone number that sent the message; the AI only receives the status and drafts the reply.

Risk Amber. If the reply says "ready" and it is not, the customer comes in for nothing: annoying, but fixable. Nobody was watching whether the system stopped, so the workshop manager is named as owner. He still makes the calls to warn a customer that a repair will cost more.

Result. A drafts-only pilot. The AI reads the sheet and drafts; the manager sends the reply with one tap from his phone. After a few weeks without corrections on that type of message, letting it send on its own goes on the table.

IN ONE LINE

The garage did not start with AI: it started by moving the whiteboard into a sheet.

07

Before you hire anyone or build anything

Write a short answer and a colour next to each block, and go through this list with the person who does the task today. Every empty box tells you what the next step is:

Checklist before you automate

12 ITEMS

- [ ] I have chosen a single task
  described with a verb
- [ ] I have counted it for a week
  how many times, how many minutes
- [ ] I know what a good answer looks like
  and who decides
- [ ] I have a business number measured
  appointments, customers or income
- [ ] I know where each piece of data lives
- [ ] I have removed the data it does not need
- [ ] I know what happens if it goes wrong
  and whether it can be undone
- [ ] Anything irreversible starts as a draft
- [ ] I have decided which contacts I keep making
- [ ] A named person owns the system
- [ ] I know how I will find out if it stops
- [ ] The pilot fits in a few weeks
  and I review it daily

If you would like to go through your answers with me, that is what the free 20-minute diagnosis is for: you bring the task already counted, and we finish with a colour for each block.

NEXT STEP

Free diagnostic (20 min)

If you want to see which part of your business can be automated with the risk under control, book a free 20-minute diagnostic.

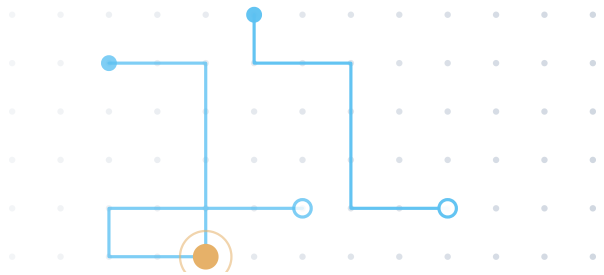
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