AI Starter Checklist

Where AI can save you hours this month. A 10-minute self-audit for small business owners.

NorthLand AI

1 Where is your time going?

Tick what's true. Fill in rough numbers.

- ☐ **Invoices and paperwork.** You copy info from one form or screen into another.
  AI can: read the document and fill in the spreadsheet or system for you.
  Mine: _____ hours a week
- ☐ **Email and the same questions, every day.** Hours, prices, "do you do ___?", and an inbox that never empties.
  AI can: sort the inbox, send each email to the right person and draft replies from your own answers.
  Mine: _____ hours a week
- ☐ **Quotes and estimates.** You retype the same wording every time.
  AI can: draft the quote from your notes or a photo, for you to check and send.
  Mine: _____ quotes a week × _____ min each = _____ hours
- ☐ **Follow-ups.** Quotes go quiet because nobody checked in.
  AI can: send polite reminders and flag who replied.
- ☐ **Scheduling.** Back-and-forth texts just to book a time.
  AI can: offer open slots, book them and send reminders.
  Mine: _____ hours a week
- ☐ **Missed calls.** Calls hit voicemail while you're busy or closed.
  AI can: answer in your business name, take the details and text you a summary.
  Mine: _____ missed calls a week
- ☐ **Reviews.** Happy customers never get asked.
  AI can: ask after each job and send complaints to you first.

> **Add up the hours you wrote down: _____ hours a week.**
> Pick the box with the most hours. That's the best place to start with AI.

Example: 10 quotes a week × 30 minutes each = 5 hours. If AI writes the first draft and you just check it and hit send, that could drop to 1–2 hours.

2 Three things to try yourself this week (free or cheap)

1. **Write your FAQ once.** Paste your 10 most common customer questions into a free AI tool (ChatGPT, Claude, Copilot). Ask for short, friendly answers. Edit and save them as quick replies.
2. **Talk it, don't type it.** Record a voice memo about a job or your week, paste the transcript into an AI tool and ask for a clean quote email or a to-do list.
3. **Draft one template.** Ask an AI tool for a quote follow-up or review request. Fix the wording, save it, reuse it.

> **Privacy rule:** don't paste customer names, health details or payment info into free AI tools.

3 Want help with the rest?

Free AI workflow call

We'll go through your boxes and show you what's worth automating first, with a rough cost. No obligation. Book at **northlandai.ca** or email **info@northlandai.ca**.

We build the demo first

Tell us the task you'd most like off your plate. We'll build a working demo of it for your business before you spend a dollar.

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