



What to Fix First in a Small Business Before Adding AI

HAP Resource Guide

Do not automate confusion

If intake is inconsistent, client communication is fragmented, or nobody can say who owns the next step, AI will not repair the structure by itself. It will simply operate inside the confusion and make the confusion scale faster.

The first target should be a workflow that already matters, already repeats, and can be described clearly enough for another person to follow.

Good first targets

Good first targets are usually intake, follow-up, proposal drafting, scheduling handoffs, recurring client updates, or SOP creation. These are high-friction loops that regularly steal owner attention and create noticeable drag.

A good first target should also be low enough risk that the business can test it without exposing sensitive information carelessly.

What to measure

Track turnaround time, dropped follow-ups, owner interruption rate, and whether the new process is still being used after thirty days. If the workflow does not stay in use, the implementation is not actually finished.

Prepared for HAP the AI Coach. This material is informational and strategic in nature. It is not medical, legal, or therapeutic advice.