

AI for Operations Quick Start Guide

50 Jobs You Can Hand to AI

Two kinds of AI help. The Assistant (Claude & Gemini) does the task... you hit send. The Agent (JourneyBuilder) runs the job on its own.

Start with 3. Pick what's eating your time.



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How to Use This Guide

There are only two places AI lives in your business. Learn the difference and the whole list below gets simple.

The Assistant — Claude & Gemini. You hand it a task, it does the work, and **you hit send**. Think brilliant intern: fast and capable, but you review before it goes out. Free to start, and where most of this list begins.

The Agent — JourneyBuilder. You set it up once and it runs the job **on its own** — answers the phone, texts back, works the chat, books the appointment, fires the follow-up. Think trained employee working a shift without you.

Here's the trick: most tasks **start as Assistant work and graduate to Agent work** once you trust them. "Draft a reply" (you review) becomes "auto-answer after hours" (runs solo). Earn the autopilot.

Your Start-Here filter

Pick your first AI task by asking three quick questions:

1. **Is it eating your time?** (you do it a lot)
2. **Is it the same every time?** (it's repeatable)
3. **Will it burn you if it's only 90% right?** (if no, it's safe to start)

Time-suck + repeatable + low-stakes = your first job to hand off. Anything customer-facing and fully solo comes **later**, once you trust it.

How to read each entry

ASSISTANT = you review and send. **AGENT** = it runs solo. **BOTH** = starts as Assistant, graduates to Agent.

Cost: **Free** = a real free plan covers it. **Free to start** = free to begin, paid for volume or advanced use. **Paid** = needs a subscription. **Paid + usage** = subscription plus per-minute voice or per-text costs (the Agent layer).

One honest note: for the legal, finance, and compliance tasks, AI gives you a fast first pass — a real accountant or attorney should still review anything official before it counts.

50 Jobs You Can Hand to AI

Customer service & front desk

1. Voice or chat agent answers FAQs 24/7

AGENT · JourneyBuilder · Paid + usage

Build the agent, feed it your hours, pricing, and services, embed the chat widget, and point your phone line to the voice agent.

2. Draft replies to emails and texts in your voice

BOTH · Claude / Gemini · Free to start

Save a short “brand voice” prompt, then paste the incoming message and get a ready-to-send draft.

3. Triage incoming messages by urgency and route them

BOTH · Claude / JourneyBuilder · Free to start

Paste a batch and ask Claude to rank by urgency, or set routing rules in your omnichannel inbox.

4. After-hours agent captures leads and books a callback

AGENT · JourneyBuilder · Paid + usage

Turn on an after-hours trigger so the agent collects details and drops a callback on your calendar.

5. Handle reschedule and cancellation requests conversationally

AGENT · JourneyBuilder · Paid + usage

Connect your calendar and switch on the reschedule flow so the agent updates bookings itself.

6. Auto-answer common questions, flag anything sensitive for a human

BOTH · JourneyBuilder / Claude · Paid + usage

Define handoff keywords so the agent escalates the tricky stuff to a real person instead of guessing.

7. Draft de-escalation replies to upset customers for staff to review

ASSISTANT · Claude · Free

Paste the angry message plus a little context and ask for two calm, on-brand options to choose from.

8. Summarize a customer's full history before a callback

BOTH · Claude / JourneyBuilder · Free to start

Paste the email thread for a quick recap, or pull the contact summary straight from your CRM.

Scheduling & appointments

9. Book appointments through a conversational agent

AGENT · JourneyBuilder · Paid + usage

Connect your calendar, set your availability, and enable booking inside the chat or voice agent.

10. Send appointment reminders to cut no-shows

AGENT · JourneyBuilder · Paid + usage

Build a reminder workflow that texts at 24 hours and 1 hour before the appointment.

11. Fill last-minute cancellations from a waitlist automatically

AGENT · JourneyBuilder · Paid + usage

Tag waitlist contacts so an open slot auto-texts the next person in line.

12. Confirm appointments and collect any pre-visit info

AGENT · JourneyBuilder · Paid + usage

Add a confirmation workflow with a short intake form link so you walk in prepared.

13. Optimize a daily route or schedule for field service

ASSISTANT · Gemini / Claude · Free

Paste your stops and ask for the most efficient order, then double-check it in Maps.

14. Coordinate multi-person scheduling

BOTH · Gemini / JourneyBuilder · Free to start

Share scheduling links or use a round-robin calendar to find a time that works for everyone.

Administrative & office operations

15. Transcribe and summarize meetings and phone calls

ASSISTANT · Fathom / Gemini / Claude · Free to start

Connect a meeting recorder so every call comes back as a transcript plus a clean summary.

16. Extract action items and assign owners and dates

ASSISTANT · Claude / Gemini · Free

Paste the transcript and ask for a table of action items with an owner and a due date for each.

17. Data entry from receipts, invoices, and forms

BOTH · Gemini / Claude / QuickBooks · Free to start

Snap a photo and ask for the data in a clean structure, or use receipt capture in your bookkeeping app.

18. Convert handwritten notes or PDFs into clean digital records

ASSISTANT · Claude / Gemini · Free

Upload the photo or PDF and ask for typed, formatted text you can paste anywhere.

19. Manage and prioritize a shared inbox, drafting suggested replies

BOTH · Gemini / JourneyBuilder · Free to start

Use Gemini inside Gmail to summarize and draft, or route every channel into one inbox.

20. Organize and auto-tag documents so they're findable later

BOTH · Claude / Gemini / NotebookLM · Free to start

Drop your files in and ask for a simple tagging or folder scheme you can stick to.

21. Draft and format internal memos, notices, and announcements

ASSISTANT · Claude / Gemini · Free

Bullet the key points and ask for a clean, formatted memo ready to send.

HR & team management

22. Answer employee policy questions from an HR brain

BOTH · NotebookLM / Claude Project · Free (verify limits)

Upload your handbook and policies so staff ask the notebook instead of asking you.

23. Draft job descriptions and do a first-pass resume screen

ASSISTANT · Claude / Gemini · Free

Describe the role for a job post, then paste resumes for a ranked fit with flags to review.

24. Generate onboarding checklists and materials for new hires

BOTH · Claude / NotebookLM · Free

Ask for a role-based onboarding checklist and load your docs so new hires can self-serve.

25. Build training materials and quizzes from existing documents

ASSISTANT · NotebookLM / Gemini · Free (verify limits)

Upload your source docs and generate a study guide or quiz to test the team.

26. Document processes into SOPs through an interview-style chat

ASSISTANT · Claude · Free

Tell it “interview me to build an SOP for X” and answer its questions while it writes the procedure.

27. Draft performance-review summaries from a manager's rough notes

ASSISTANT · Claude · Free

Paste your bullet-point notes and ask for a balanced, professional review draft.

28. Summarize timesheets and PTO requests, flag conflicts

BOTH · Gemini / Claude · Free to start

Paste the time data and ask for a summary plus any overlapping or conflicting requests.

29. Coordinate shift coverage and draft the messages to fill gaps

BOTH · Claude / JourneyBuilder · Free to start

Draft the coverage ask, then blast it to staff through an SMS workflow.

Finance & bookkeeping

30. Categorize expenses and transactions

BOTH · QuickBooks / Gemini · Free or Paid

Let your bookkeeping app auto-categorize, or paste a CSV into Gemini for a quick pass.

31. Generate invoices from completed job or work records

BOTH · QuickBooks / JourneyBuilder · Paid

Tie an invoice template to a “job complete” trigger so billing happens on its own.

32. Chase overdue invoices with polite, escalating follow-ups

AGENT · JourneyBuilder · Paid + usage

Set an overdue trigger that sends a polite nudge, then a firmer one, automatically.

33. Flag receipts that don't match statements for human review

ASSISTANT · Claude / Gemini · Free to start

Paste both lists and ask for the mismatches so you only review the exceptions.

34. Summarize the month's financials in plain language

ASSISTANT · Claude / Gemini · Free

Export your P&L, paste it in, and ask it to explain the numbers like you're the owner.

35. Build a simple cash-flow or revenue snapshot on demand

ASSISTANT · Gemini / Claude · Free

Paste the data and ask for a quick snapshot with a simple chart you can glance at.

36. Flag unusual spending or transactions worth a second look

ASSISTANT · Claude / Gemini / QuickBooks · Free to start

Paste recent transactions and ask, plainly, "what looks off here?"

Sales operations (the ops side, not marketing)

37. Qualify inbound leads and route them by fit and urgency

BOTH · JourneyBuilder / Claude · Free to start

Add a scoring rule with routing, or batch-score leads in Claude before they hit your pipeline.

38. Draft quotes and estimates from intake information

ASSISTANT · Claude / Gemini · Free

Paste the intake details and ask for a quote built from your standard template.

39. Follow up automatically on quotes that haven't been accepted

AGENT · JourneyBuilder · Paid + usage

Trigger a follow-up sequence whenever a quote is sent but not accepted after a few days.

40. Update CRM records from call notes and email threads

BOTH · JourneyBuilder / Claude · Free to start

Paste notes and ask for CRM-ready fields, or use built-in note-to-CRM automation.

41. Assemble proposals from a template plus the client's specifics

ASSISTANT · Claude / Gemini · Free

Give it your template and the client details and ask for a filled, polished proposal.

Operations & process

42. Create opening, closing, and shift checklists

ASSISTANT · Claude / Gemini · Free

Describe the shift and ask for a checklist you can print and post by the register.

43. Draft vendor and supplier communications

ASSISTANT · Claude / Gemini · Free

State the order, follow-up, or issue and ask for the email, ready to send.

44. Track inventory and draft reorder requests when stock runs low

BOTH · Gemini / JourneyBuilder · Free to start

Set a low-stock threshold in a sheet that triggers a drafted reorder request.

45. Maintain a library of standard operating responses

BOTH · Claude Project / NotebookLM · Free

Store your canned responses in one place and pull the right one whenever you need it.

46. Generate a daily or weekly operations summary for the owner

BOTH · Gemini / Claude · Free to start

Feed in the day's numbers and ask for a short recap, then schedule it to land each morning.

Compliance & documentation

47. Summarize contracts and agreements, flagging key dates and terms

ASSISTANT · Claude · Free

Upload the contract and ask for a plain-English summary, every key date, and anything to watch.

48. Track license, permit, and certification renewals with reminders

BOTH · Claude / JourneyBuilder · Free to start

List your renewals and turn them into calendar or automation reminders so nothing lapses.

49. Draft and maintain policy documents, updating them when rules change

ASSISTANT · Claude / Gemini · Free

Paste the current policy plus the change and ask for the updated version.

50. Keep audit-ready documentation organized and current

BOTH · NotebookLM / Claude · Free (verify limits)

Centralize your documents in one notebook you can query any time an auditor asks.

Your move tonight: open Claude or Gemini (both free) and hand off ONE Assistant task. When you're ready to put the phones, texts, and follow-ups on autopilot, that's the Agent layer — and that's a conversation. Book a call at fridays.jaytheaguy.com.