

THE PLAYBOOK

AI Inside the Business

5 practical plays + 1 bonus, shown inside one company, from Monday's meeting to Saturday's call.



01 · Meetings

02 · New ideas

03 · Best customers

04 · Morning orders

05 · The business picture

Bonus · Calls

Six plays. One company.

From Monday's meeting to Saturday's call.

Each play follows the same business, with the input, what AI prepares, and the decision a person makes. Then a first step you can take this week.

01

P. 05

Record your internal meetings, and let AI handle the notes.

Everyone stays in the conversation. Recaps, personal follow-ups and reminders go out on their own.

02

P. 08

Let AI attack your idea before your customers do.

Launch with a better plan, and a team that has the answers before the first question.

03

P. 11

Study your best customers, not your whole market.

Find what your best accounts have in common, then turn it into a test.

04

P. 14

Start with the step that makes the biggest difference.

Orders from email, text, voicemail and photos, prepared for a quick check.

05

P. 17

See your whole business in one clear picture.

Your numbers and your customers' voice, side by side.

BONUS

P. 20

Answer the calls nobody can pick up.

A call at six in the morning or on a Saturday gets answered, and the right person knows.

Meet Demo Supply Co.

A food distributor that delivers to restaurants and cafés. Fictional, with sample data, so every number in this playbook can be shown in full.

68

ACTIVE
ACCOUNTS

312

ORDERS
IN 30 DAYS

Every play, the same four steps

STEP 1

The input

A meeting, a plan, orders, customer messages.

STEP 2

What AI prepares

A recap, a test, a draft order, a summary.

STEP 3

A person decides

Checks it, confirms it, makes the call.

STEP 4

Your first step

Something small to try this week.

From AI use to useful work.

AI adoption is growing. The opportunity is to connect it to the work that matters inside the business.

~20%

of EU enterprises used AI in 2025.

Eurostat, 2025. Enterprises with 10 or more people employed (19.95%).

71%

of EU enterprises that considered AI but didn't use it named a lack of relevant expertise as a reason.

Eurostat, 2025. Among enterprises that had considered AI; the most common reason given (70.89%).

76%

of the AI-using small and medium businesses in an OECD survey were "AI Novices": ready-made tools for isolated tasks.

OECD, Empowering SMEs in the age of AI, 2026. Based on 1,240 survey responses, about three quarters from Japan; the OECD notes the sample is not representative.



The next step is practical

The six plays ahead start with something every business already has: a meeting, a new idea, its best customers, a workflow, its numbers, its phone line. Each one shows where AI fits, and what a person still decides.

Each number is dated and sourced, so you can check for newer figures. Full sources at the end.

THE COMPANY

Meet Demo Supply Co.

A food distributor that delivers to restaurants and cafés. It's fictional, so every input and every AI output in this playbook can be shown in full.

THE TEAM

R

Rachel

General manager

T

Tom

Office manager

D

Dan

Sales lead

P

Priya

Warehouse lead

M

Mike

Drivers' lead

THE LAST 30 DAYS

\$84.2k

Revenue, up 8%

312

Orders delivered, up 6%

68

Active accounts

7

New accounts

A NORMAL MORNING

5

Ways orders arrive: email, text, voicemail, photos of handwritten lists, calls

6:00

When chefs start lunch prep

8:00

When the office opens

i

How to read this playbook

The numbers in the six plays come from Demo Supply Co.'s sample data; the figures on page 03 come from the cited research. Every screen marked **AI output** was generated by AI from that sample data, then selected and laid out for this playbook. The wording is the AI's.

Each play follows the same four steps: the input, what AI prepares, what a person decides, and a first step you can take this week.

01

MEETINGS

Record your internal meetings, and let AI handle the notes.

Every Monday, Demo Supply Co.'s team meets: sales, the warehouse, the drivers' lead and the office. That's where the week's decisions get made. With an AI note-taker in the room, everyone can stay in the conversation.

STEP 1 THE INPUT

MONDAY MEETING · WEEK 12

EXCERPT FROM THE SAMPLE TRANSCRIPT

- 08:31 **Tom** Yes. Orders still come in five different ways: email, text, voicemail, photos of handwritten lists, and the odd call to someone's cell. This morning we had orders from eleven restaurants before six, in four formats. Everything gets typed in before the trucks load.
- 08:32 **Priya** On my side, loading starts when the last order is in the system. Today that was 6:40.
- 08:33 **Rachel** So what do we change?
- 08:33 **Tom** I'd like to set up one shared inbox for all morning orders. Restaurants can still text or send a photo, but it all lands in one place, with a simple order form for anyone who wants it. I can have the inbox ready and the announcement sent to all restaurants by Friday.
- 08:35 **Rachel** Good. Tom owns that. Inbox ready and restaurants told by Friday.
- 08:35 **Mike** Can the announcement say orders before 5:30 make the first truck? It would help the downtown route.

TOOLS THAT TAKE THE NOTES

Fireflies

Notta

Otter

Read AI

tl;dv

Built into Microsoft Teams

Built into Google Meet

In Teams the feature is intelligent recap (it needs Teams Premium or Microsoft 365 Copilot). In Google Meet it's "Take notes for me".

Where does the meeting data go?

If your company uses Microsoft, Google or Salesforce, you already trust them with emails, documents or customer data. These apps say they follow GDPR, and they go through the same kind of independent security audit (SOC 2). So why trust one and not the other?

Check the data protection rules that apply to your business. Sources are listed at the end of this playbook.

Nobody has to take notes. Everyone gets what they need.

STEP 2 WHAT AI PREPARES

The recap for everyone who was there: who does what, by when

AI OUTPUT

Tom	Set up the shared inbox and send restaurants an announcement that orders before 5:30 make the first truck.	Friday
Mike	Try the new downtown stop order, with cafés before the two hotels.	Wednesday
Mike	Report back on the downtown route.	Next Monday
Dan	Send tasting invitations to the three restaurants interested in opening accounts.	Thursday
Priya	Confirm with the dairy supplier that deliveries can start at 5:30 next Monday.	Wednesday
Rachel	Bring the small-order delivery fee numbers for a group decision.	Next Monday

To: Tom

AI OUTPUT

Subject: Your Week 12 follow-up

Please have the shared inbox ready and send the restaurant announcement by Friday, including that orders before 5:30 make the first truck. Thanks!

A personal email for each person, with only what they agreed to do.

Reminder by text, prepared for Tom

AI OUTPUT

Reminder: Have the shared inbox ready and send restaurants the announcement, including the 5:30 first-truck cutoff, by Friday.

Prepared for Thursday

Once the note-taker is connected to an automation, reminders like this go out on their own, one day before the deadline.

STEP 3 WHAT A PERSON DECIDES

● A quick check before anything goes out

- 1 The team makes the decisions in the room.
- 2 The meeting lead checks the recap: right owners, right dates.
- 3 Approve it with one click, or let it send on its own once the team trusts it.

From one 11-minute meeting: 6 tasks, 5 personal emails and 6 reminders, ready without anyone taking notes.

The follow-up runs on its own, and the leader has more time for the work that moves the business forward.

AI output from one run on the sample transcript. The wording is the AI's; the layout is ours.

After twelve Mondays, the patterns show up.

After three to six months of meetings, ask AI to look across all of them: which topics come up most, what's been decided, and where the team could use support.

Topics across the last 12 Monday meetings

AI OUTPUT

Morning orders

8 of 12

Orders arriving through several formats took time to enter, sometimes delayed loading, and led to a plan for one shared inbox.

Sales and new accounts

7 of 12

The team discussed prospects, new accounts, and the success of produce tastings.

Delivery routes and timing

6 of 12

Late departures and downtown routing prompted a proposed route split, a festival detour, and a test of a new stop order.

The AI found 9 topics in 12 meetings and logged 13 decisions. The top three are shown.

Where the team could use support

AI OUTPUT

- Help Tom bring incoming orders into the shared inbox and make the morning entry process easier to manage.
- Help the team measure how order entry and the proposed earlier dairy delivery affect loading and first-truck departure times.
- Help Rachel assess the small-order delivery fee with delivery costs and the ordering patterns of cafés that place small orders twice a week.

STEP 4 Try it this week

- 1 Pick one recurring internal meeting.
- 2 Turn on AI notes in Teams or Meet, or try one of the apps.
- 3 Send the recap and the personal follow-ups for four weeks.

Watch: how many action items get done by their due date.

In another B2B business

An IT services company holds a weekly internal team meeting. AI sends each engineer their own tasks, and after a quarter the team lead sees which client requests keep coming back.

The morning orders came up in **8 of the last 12 meetings**. That's where play 04 starts.

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02

NEW IDEAS

Let AI attack your idea before your customers do.

Before you launch something (a new price, a new service, a big proposal), ask AI to play the people who'll push back. A skeptical customer. A competitor. Even the person who runs your numbers.

STEP 1 THE INPUT**Plan: delivery fee on small orders**

From: Rachel, General Manager, Demo Supply Co. · planning only. Nothing has been announced to customers yet.

The idea. Add a \$25 delivery fee to every order under \$300. Orders of \$300 or more keep free delivery, as today.

Why. Small orders cost money to deliver. Every stop takes the same truck, driver time and fuel, whether the order is \$120 or \$1,200. Today only the price of the products covers that cost, and a small order has less to cover it with.

ORDERS_LAST_30_DAYS.CSV

312 ORDERS · LAST 30 DAYS

Date	Account	Type	Amount
2026-09-19	Flour & Fern	bakery	\$340.92
2026-09-19	Paprika Grill	restaurant	\$227.17
2026-09-19	Rise Bakehouse	bakery	\$229.78
2026-09-19	Riverside Café	café	\$168.17
2026-09-19	Riverside Café	café	\$168.17
2026-09-23	Riverside Café	café	\$184.91

...

Sample data. The plan is still on paper: no customer has heard about it.

Three people push back. The plan gets better.

STEP 2 WHAT AI PREPARES

RC

Riverside Café

A small café that orders twice a week

AI OUTPUT

"We order about twice a week because that suits a small café's storage and demand. All nine of our orders in the file were under \$300, so this plan would have added \$225 over those 30 days—usually \$50 in a two-delivery week. Please give us a practical way to keep our delivery schedule without paying a fee every time."

+\$50 a week

2 orders a week, all under \$300

CD

Sales rep at a competing distributor

A sales rep at a competing distributor

AI OUTPUT

"I would call cafés, bakeries, and restaurants that rely on smaller, frequent deliveries and ask to compare their full delivered cost. I would offer a written quote for their actual order pattern and delivery days, with any minimums or fees stated clearly. Riverside's nine deliveries would be an obvious conversation starter because this proposal adds \$225 to them over the recorded period."

#

Demo Supply Co. pricing analyst

The person who runs the numbers

AI OUTPUT

"The file has 312 orders; 187 are under \$300, or 59.9%, so this is a broad change rather than an occasional charge. Applying \$25 to each qualifying order would have produced \$4,675 in fees on these orders if ordering behavior stayed the same. That is a billing scenario, not a profit forecast: the file has no delivery costs and cannot tell us how many customers would consolidate orders or leave."

187 of 312 orders under \$300

59.9%

Average order \$269.87

AI output from one run on the plan and the sample orders. Chips in purple are our own count from the order file.

STEP 3 WHAT A PERSON DECIDES

● The team makes the call

- 1 Check AI's numbers against your own system.
- 2 Pick one version of the plan to test with a few accounts.
- 3 Decide before anything is announced.

Launch with a better plan, and a team that's ready.

BETTER VERSIONS OF THE PLAN

AI OUTPUT

Scheduled delivery option

Keep the proposed fee for orders under \$300, but offer a fee-free delivery on a designated route day when the customer orders by a cutoff.

Account-level review

Before applying the fee, review frequent small-order accounts and agree on a delivery schedule or ordering arrangement that works for both sides.

Advance notice and trial

Announce the proposed \$300 threshold and \$25 fee in advance, show customers which recent orders would have qualified, and trial the policy before making it permanent.

QUESTIONS CUSTOMERS ARE LIKELY TO ASK

AI OUTPUT

When would the fee start?

No start date has been set; this is still a proposal. We will give notice before any change takes effect.

Which orders would be charged?

Under the current proposal, a delivery with a product order below \$300 would have one \$25 fee. Orders of \$300 or more would keep free delivery.

Will product prices also rise?

The current proposal does not change product prices. The delivery fee would appear as a separate invoice line.

Can I combine orders to avoid the fee?

An order of \$300 or more would avoid the proposed fee. We can discuss whether a different ordering or delivery schedule works for your business.

● Try it this week

- 1 Write your next idea in half a page.
- 2 Give AI the plan and the real numbers behind it.
- 3 Ask it to react as a customer, a competitor and the person who runs the numbers.

Watch: how many of the first customer questions your team already has an answer for.

In another B2B business

A staffing agency plans a fee for last-minute requests. It asks AI to react as a client, a rival agency and its finance lead before the first client hears about it.

AI won't tell you what customers will do. But it helps you launch with a better plan and a team that's prepared.

03

BEST CUSTOMERS

Study your best customers, not your whole market.

Instead of going after the whole market, take your highest-revenue customers and ask AI what they have in common. At Demo Supply Co., all fifteen have been customers for more than two years.

STEP 1 THE INPUT

ACCOUNTS.CSV

68 ACCOUNTS · SAMPLE DATA

Account	Type	Months	How they found us	12-month revenue
Basil & Bloom	restaurant	37	Found us on the website	\$11,335
Bayside Inn & Conference	hotel	36	Tasting visit from a sales rep	\$29,636
Bean & Leaf	café	5	Met at the regional food trade show	\$4,025
Bellwether Tavern	restaurant	55	Tasting visit from a sales rep	\$30,908

... 68 accounts, each with the note from the first call

The question

Take the top fifteen accounts by revenue over the last 12 months. What do they have in common that the other fifty-three don't? Look at each account's orders in the last 30 days, how it found the company, and the notes from the first call.

One difference stands out.

Tasting visits.

STEP 2 WHAT AI PREPARES

The 15 best accounts

73%

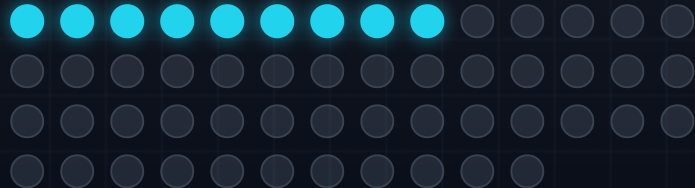
11 of 15 started with a tasting visit



The other 53

17%

9 of 53 started with a tasting visit



● Started with a tasting visit ● Started another way

What AI found

AI OUTPUT

- F1 A tasting visit from a sales rep was how 11 of the top fifteen first found the company, compared with 9 of the other fifty-three. **Strongest lead.**
- F2 Every top account placed six orders in the last 30 days, compared with five of the other accounts.
- F3 Every top account had an average order of at least \$380 in the last 30 days, while none of the other accounts did.
- F4 All top accounts had at least 26 full months of tenure, compared with 23 of the other accounts.

AI's own caution. These are associations among active accounts, not evidence that tastings cause higher revenue. Accounts have different tenures, and the file does not show acquisition costs or accounts that closed.

STEP 3 WHAT A PERSON DECIDES

Not proof that tastings make better customers. But it's a lead worth testing, and sales decides how.

Turn the pattern into a small test.

The test AI suggested

AI OUTPUT

What	Offer a sales rep tasting visit to some new prospects and compare their results with prospects reached through the usual approach.
Who	New restaurant and hotel prospects
Measure	Conversion to an active account, then orders and revenue in the first 30 days
How long	30 days after each prospect's first contact

● Try it this week

- 1 Pull your top fifteen accounts by revenue.
- 2 Add how each one found you and the notes from the first call.
- 3 Ask AI to compare them with everyone else.

Watch: how many new accounts come from your strongest lead, and whether they keep ordering.

In another B2B business

A parts manufacturer finds that most of its best accounts started with an on-site engineering visit. It offers one to similar prospects and tracks which ones become regular buyers.

The morning orders came up in 8 of the last 12 Monday meetings. That's play 04.

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04

MORNING ORDERS

Start with the step that makes the biggest difference.

You don't need to automate a whole department at once. Start with one step: the one the rest of the day depends on. At Demo Supply Co., it's the morning orders. That one step decides whether the trucks leave on time.

STEP 1 THE INPUT: FOUR ORDERS, FOUR FORMATS

EMAIL

ANA, OLIVE & THYME · MONDAY 11:48 PM

Hi team, for tomorrow please:

2 cases romaine

1 case lemons

10 lb butter

3 quarts heavy cream

2 sacks yellow onions

Thanks!

Ana

TEXT MESSAGE

JESS, MORNING RITUAL CAFÉ · TUESDAY
5:12 AM

morning! 4 gal whole milk, 2 half gal oat milk, 3
dz croissants pls. thx

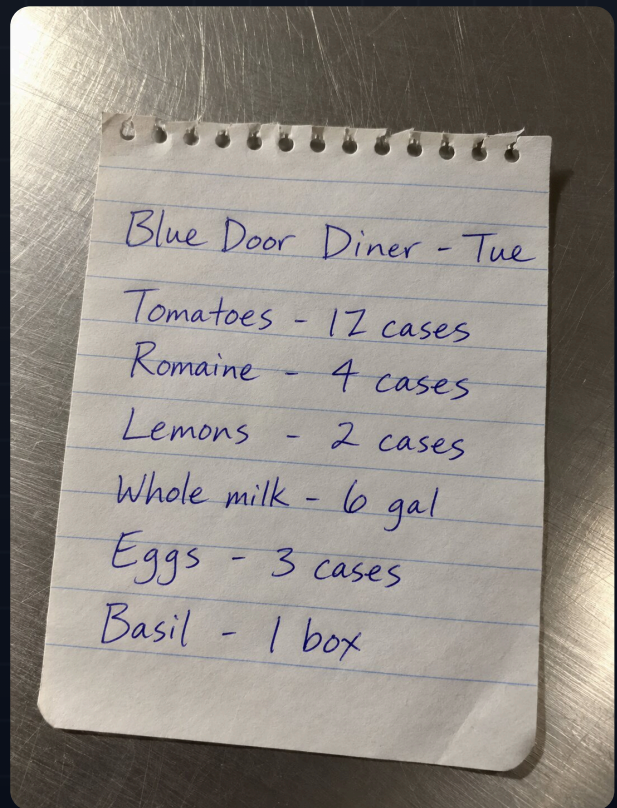
VOICEMAIL TRANSCRIPT

LUIS, CORNER TAQUERIA ·
TUESDAY 5:40 AM

Hey, it's Luis from Corner Taqueria. For today we
need two cases of avocados, six bunches of cilantro,
one case of limes, and four packs of corn tortillas.
Thanks!

PHOTO

BLUE DOOR DINER · TUESDAY



Sample orders. The voicemail is shown as its automatic transcript; the photo is a sample handwritten list.

AI prepares the orders. It doesn't guess.

STEP 2 WHAT AI PREPARES

AI OUTPUT

Olive & Thyme

email

Romaine lettuce	2 × case (24 heads)
Lemons	1 × case (115 count)
Butter	10 × lb
Heavy cream	3 × quart
Yellow onions	2 × sack (50 lb)

Morning Ritual Café

text message

Whole milk	4 × gallon
Oat milk	2 × half gallon
Croissants	3 × dozen

Corner Taqueria

voicemail

Avocados	2 × case (48 count)
Cilantro	6 × bunch
Limes	1 × case (200 count)
Corn tortillas	4 × pack (50)

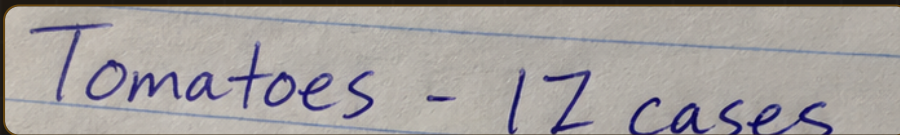
Blue Door Diner

photo

Romaine lettuce	4 × case (24 heads)
Lemons	2 × case (115 count)
Whole milk	6 × gallon
Eggs	3 × case (15 dozen)
Basil	1 × box (1 lb)
Tomatoes	12 or 17?

Tomatoes: 12 or 17?

Flagged, not guessed



"The handwritten second digit could be a 2 or a 7; the quantity cannot be confirmed confidently."

STEP 3 WHAT A PERSON DECIDES

- **A person checks it and confirms**

- 1 Every prepared line is checked before it goes into the system.
- 2 On the flagged line, a quick call to the restaurant settles it.
- 3 Then the trucks are loaded.

The typing gets faster. A person makes the final call.

AI output from one run: 4 orders, 17 lines prepared, 1 flagged for a person. AI's note to the reviewer: "Confirm the tomato quantity on the photo before entering that line. The photo shows Tuesday but no receipt time."

Then go further: an ordering app made for you.

Demo Supply Co.
Blue Door Diner

Order for Tuesday

Tomatoes case (25 lb)	- 12 +
Romaine lettuce case (24 heads)	- 4 +
Lemons case (115 count)	- 2 +
Whole milk gallon	- 6 +
Eggs case (15 dozen)	- 3 +

Orders before 5:30 make the first truck.

Send order

AI can also help you build a simple ordering app for your customers, designed around the way your business works. Restaurants pick what they need, and the order goes straight into your system.

No typing, no guessing at handwriting, and the 5:30 cutoff the team agreed on in Monday's meeting is right on the screen.

Example design for this playbook, not a live app.

A workflow made for your business, **not the other way around.**

Try it this week

- 1 Collect one morning's orders from every channel.
- 2 Ask AI to turn them into order lines against your catalog.
- 3 Have a person check every line for two weeks.

Watch: the time between the last order coming in and the first truck leaving.

In another B2B business

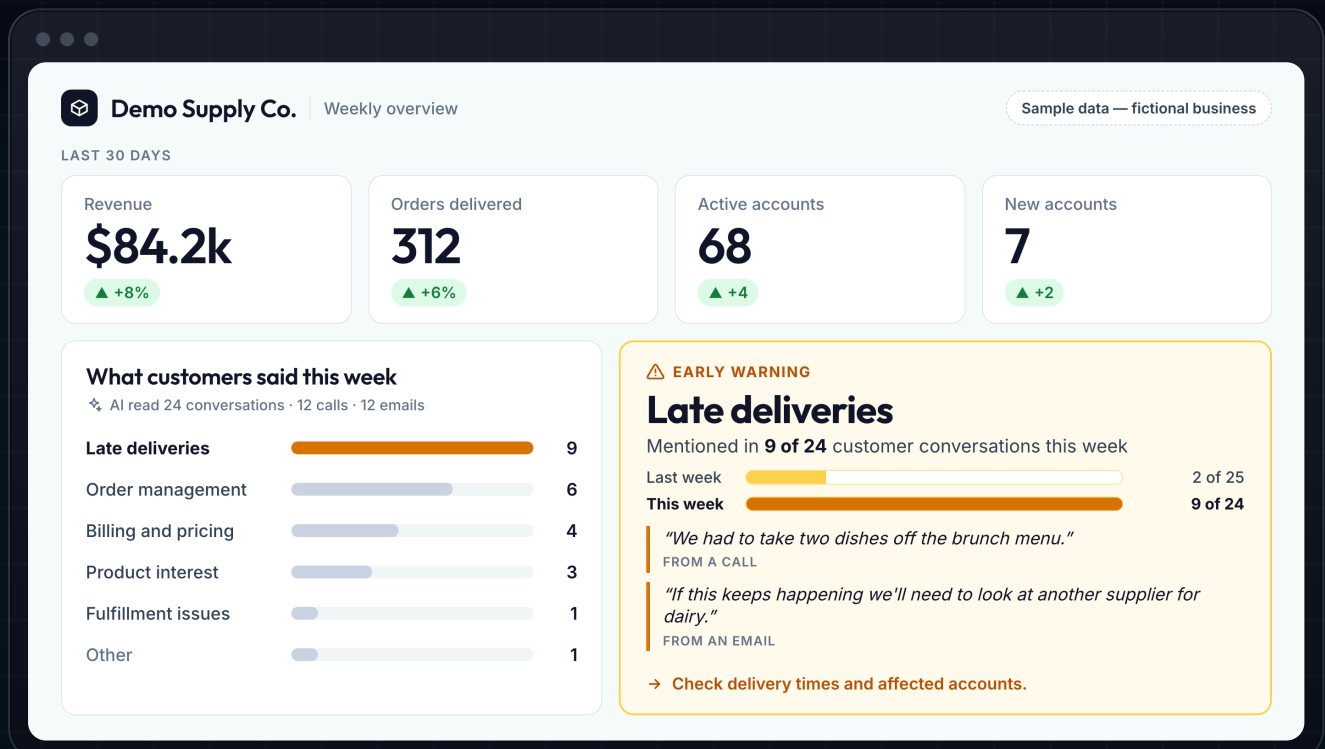
A manufacturer receives purchase orders as emails, PDFs and spreadsheets. AI prepares each one in the order system, and a person confirms it before production is scheduled.

05

THE BUSINESS PICTURE

See your whole business in one clear picture.

Most dashboards show numbers: revenue, orders, accounts. AI can add the voice of your customers, so every decision about growth starts from the full picture.



Demo Supply Co. dashboard. Sample business and numbers; the customer analysis was done by AI on sample conversations.

+8%

Revenue growth, last 30 days

7

New accounts, last 30 days

9 of 24

Customer conversations this week mention late deliveries. Last week: 2 of 25.

The input: revenue, orders and accounts from the system, plus this week's 24 customer calls and emails.

Numbers and customers, side by side.

STEP 2 WHAT AI PREPARES

What customers said this week: AI read 24 conversations (12 calls, 12 emails)

AI OUTPUT

Late deliveries		9 · 2 last wk
Order management		6 · 11 last wk
Billing and pricing		4 · 5 last wk
Product interest		3 · 4 last wk
Fulfillment issues		1 · 2 last wk
Other		1 · 1 last wk

Late deliveries: 9 of 24

Last week: 2 of 25

"We had to take two dishes off the brunch menu." · from a call

"If this keeps happening we'll need to look at another supplier for dairy." · from an email

STEP 3 WHAT A PERSON DECIDES

What the team does next

- 1 Open the nine conversations.
- 2 Check the delivery records.
- 3 Call the customers affected before their next order.

AI output: the topics and the quotes come from AI reading 49 sample customer conversations (this week and last week); the counts were checked by a script.

Decide with the full picture.

Revenue is up. Orders are up. Seven new accounts. And the customers' own words point to where the team can act first.

That's the value: a simple, clear picture of your business, to help you make well-informed decisions as it grows.

● Try it this week

- 1 Take two weeks of customer emails and call notes.
- 2 Ask AI to group them by topic and count each one.
- 3 Put the topics next to your revenue and orders.

Watch: mentions per topic, week over week.

In another B2B business

An IT services company puts contract renewals next to what clients say in their support tickets. A rise in one topic tells the account team which clients to call first.

The office opens at 8. Chefs start at 6. That's the bonus.

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BONUS · CALLS

Answer the calls nobody can pick up.

Demo Supply Co.'s office opens at 8. Chefs start at 6. And new restaurants call when it suits them, Saturdays included. An AI voice agent can answer both, and get the right person moving.

STEP 1 THE INPUT: A ONE-PAGE BRIEF

Voice agent brief: Demo Supply Co.

What the agent knows, and what it never does

Office hours: Monday to Friday, 8:00 AM to 5:00 PM. Deliveries Monday to Saturday. From 5:00 to 8:00 AM, Priya (warehouse lead) is on call and can be alerted by text. New accounts: a meeting with Dan (sales lead), in his open slots.

Never: quote prices or minimum orders, or promise a delivery time. Say who will follow up, and when.

Tuesday, 6:04 AM

A chef opens a delivery. The heavy cream is missing, and lunch prep has already started.

Saturday, 10:20 AM

A new restaurant wants to know about deliveries and opening an account.

Tuesday, 6:04 AM. The person on call knows.

STEP 2 WHAT AI PREPARES

TUESDAY, 6:04 AM · LANTERN BISTRO

TEXT SIMULATION

AI OUTPUT

Caller	Hi, this is Marco from Lantern Bistro. Our delivery just came in, order 4817, and the heavy cream is missing. We ordered three quarts.
Agent	I'm sorry the cream was missing, Marco. I have order 4817 and three quarts of heavy cream. What's the best number for the warehouse to call you?
Caller	We need it before nine for lunch prep. Can someone bring it?
Agent	I'll alert Priya, our warehouse lead, now and tell her you need it before nine. She'll check what's possible and call you; I can't promise a delivery time.
Caller	Okay, thanks. My number is 555-0142.
Agent	Thanks. I'll send Priya the details and your number, 555-0142, now.

Text alert prepared for Priya, warehouse lead

AI OUTPUT

Marco at Lantern Bistro reports three quarts of heavy cream missing from order 4817. He needs it before 9:00 AM for lunch prep and asks whether someone can bring it. Please check what's possible and call him at 555-0142.

Priya takes it from here and calls Marco with an update.

It can't drive the truck

The agent doesn't fix the missing cream on its own, and it doesn't promise a delivery time. But the person on call knows about it at six, not at eight.

A text simulation: the caller's lines are fixed; an AI played the agent, following the brief. Not a recording of a real call.

Saturday, 10:20 AM. A meeting on Monday.

SATURDAY, 10:20 AM · JUNIPER & RYE

TEXT SIMULATION

AI OUTPUT

- Caller** Hi, I'm opening a restaurant downtown next month, Juniper & Rye. I'd like to know which days you deliver and how to open an account.
- Agent** Congratulations on Juniper & Rye. We deliver Monday through Saturday. Dan, our sales lead, can walk you through opening an account. What's your name and the best callback number?
- Caller** What's your minimum order?
- Agent** Dan will go over minimum orders with you; he sets those details. I can arrange a sales meeting. We have Monday at 10:00 or 11:30 AM, or Tuesday at 2:00 PM.
- Caller** Monday works, late morning if possible. I'm Sofia, and my email is sofia@juniperandrye.example.
- Agent** Thanks, Sofia. I'll book you with Dan for Monday at 11:30 AM and send the details to sofia@juniperandrye.example. What's the best callback number for Dan? You can reply to the meeting email with it.

MON

11:30
AM

Meeting details prepared · Sofia (sofia@juniperandrye.example) and Dan, sales lead
Sales meeting with Sofia of Juniper & Rye about opening a new account, delivery days, and minimum orders. Sofia's email is sofia@juniperandrye.example; callback number was requested but not provided.

AI OUTPUT

STEP 3 WHAT A PERSON DECIDES

Priya takes it from here and calls Marco with an update. Dan takes it from here and discusses the new account and minimum order with Sofia.

● Try it this week

- 1 List the calls you miss: early mornings, evenings, weekends.
- 2 Write a one-page brief: what the agent may answer, who it alerts, what it never promises.
- 3 Test it with ten scripted calls before it answers a real one.

Watch: calls answered outside office hours, and how fast the right person knows.

In another B2B business

A staffing agency's agent answers candidates who call in the evening, books interviews into the recruiters' calendars, and alerts the on-call recruiter when a client needs someone tomorrow.

YOUR FIRST TWO WEEKS

A two-week pilot for one play.

Pick one play. Run it small, with one owner, one source of data and one number to watch.

Week 1

Set it up

- Day 1** Pick the play and the person who owns it.
- Day 2** Choose the data: sample data, or data you're allowed to use.
- Day 3** Write down today's number: the one you'll watch.
- Days 4–5** First AI runs. The owner checks every output.

Week 2

Run it for real

- Days 6–9** Use it in the normal routine. A person checks before anything goes out.
- Day 10** Compare with day 3. Keep it, change it or stop it.
- After** Kept it? Pick the next play.



Small on purpose

One play, one owner, one number. Two weeks is enough to see whether it saves time or sharpens a decision, before anything bigger is built.

Which play to start with.

Start where the benefit is easiest to see. If this sounds like your week, start here.

Meetings end, and the follow-up takes your time.

01

Watch: Action items done by their due date

A new price, service or proposal is coming.

02

Watch: Customer questions you can answer on day one

You want growth and don't know where to look first.

03

Watch: New accounts from your strongest lead

One step holds up the rest of the day.

04

Watch: Time from the last order in to the first truck out

You see the numbers but not the reasons behind them.

05

Watch: Mentions per topic, week over week

Calls come in when nobody can answer.

+1

Watch: Calls answered outside office hours

01

Not sure? Start with play 01

Every business has meetings. Turn on AI notes for one weekly meeting, and the first recap and personal follow-ups arrive the same day.

Same six plays, other industries.

Demo Supply Co. is a food distributor. If you sell to other businesses, the same plays apply. Swap in your own company.

	IT SERVICES	STAFFING	MANUFACTURING
01	Weekly team meeting: each engineer gets their own tasks.	Weekly recruiter meeting: each recruiter gets their own follow-ups.	Daily production meeting: each shift lead gets their own actions.
02	A new support plan, tested against a client, a rival and finance.	A fee for last-minute requests, tested before clients hear about it.	A new minimum order quantity, tested against a buyer and a rival.
03	Clients with the longest contracts: how did they start?	Clients that keep coming back: how did the first placement go?	Best accounts: did they start with an on-site visit?
04	Support requests from email, chat and phone, prepared as tickets.	Timesheets in every format, prepared for payroll.	Purchase orders from emails and PDFs, prepared for scheduling.
05	Renewals next to what clients say in tickets.	Fill rate next to what candidates and clients say.	Output next to what customers say about quality.
+1	After-hours support line that alerts the on-call engineer.	Evening calls from candidates, booked into interviews.	Distributors calling for order status after hours.

A short checklist for data and people.

Data

- ☐ What data does the play read, and where does it go?
- ☐ Which data protection rules apply to your business (for example, GDPR)?
- ☐ Does the vendor publish its security and privacy statements (for example, SOC 2 and GDPR)?
- ☐ Who can see the outputs?
- ☐ Can you start with sample data?

People

- ☐ Who owns the play?
- ☐ What does a person check before anything goes out?
- ☐ What does AI never decide on its own (prices, promises, payments)?
- ☐ What gets flagged to a person, and who answers it?
- ☐ When do you look at the results together?

i

How the AI outputs in this playbook were made

We wrote the sample data for Demo Supply Co.: meetings, orders, accounts, conversations and calls. Each screen marked AI output comes from one AI run on that data in October 2026, with no access to our notes or answer keys. A script then checked the key facts in each output (owners, dates, quantities, counts) against an answer key written together with the data. The calls are a text simulation: messages and bookings were prepared, not sent.

Where the facts come from.

The bigger picture (page 3)

Eurostat, Use of artificial intelligence in enterprises (data extracted December 2025).
ec.europa.eu/eurostat/statistics-explained/index.php?title=Use_of_artificial_intelligence_in_enterprises
OECD (2026), Empowering SMEs in the age of AI. doi.org/10.1787/bf5a9816-en

Meeting notes and data protection (play 01)

Fireflies fireflies.ai/security · Notta notta.ai/en/security · Otter otter.ai/privacy-security · Read AI read.ai · tldv.io

Microsoft Teams intelligent recap: support.microsoft.com/en-us/teams/meetings/recap-in-microsoft-teams ·

Google Meet Take notes for me: support.google.com/meet/answer/14754931

Microsoft learn.microsoft.com/en-us/compliance/regulatory/offering-soc-2 · Google Cloud

cloud.google.com/security/compliance/soc-2 · Salesforce compliance.salesforce.com/en/categories/soc-2

Reminders after a meeting: guide.fireflies.ai/articles/8908189165-how-to-integrate-zapier-with-fireflies ·
zapier.com/apps/sms/integrations

Credits

Made by DotFlow. Demo Supply Co., its team, customers and calls are fictional. Tool names belong to their owners and are mentioned as examples, not endorsements. Facts checked in October 2026.

Want to see one of these plays in your business?

DotFlow builds AI workflow automation and AI voice agents for businesses. Try the voice agent on our website, or book a call and bring the one step you'd like to fix first.

dotflow.bot

[Book a call](#)

contact@dotflow.bot