

107 ways to put an AI agent to work

Where to start, when you know AI can help but not where. Browse by the kind of work you do, or jump to your industry. Find the row that sounds like your week, and start there.

107 USE CASES · 8 KINDS OF WORK · 25 INDUSTRIES · SORTED BY EFFORT, NOT HYPE

Most people know AI can help. Almost nobody knows where to start.

So we made the list we wish everyone had. Every item below is something a small business is already handing to an AI agent today. Some you can try this afternoon. Some are worth setting up once and forgetting. A few are worth bringing in help to build right.

One thing you won't see here: a pitch to automate everything. The point isn't to replace your team. It's to take the slow, repeating parts off their plate so they spend the day on the work only people can do.

Start today

An off-the-shelf agent can do this now.
Little or no setup.

Set up once

Worth configuring one time, then it runs every week on its own.

Bring in a build

Custom work or expert hands pay off.
This is where we come in.

Start here this week

Ten easy wins. Pick one, try it Monday, and you'll get the idea fast.

- 1 Triage your inbox every morning
- 2 Turn every meeting into follow-ups and tasks
- 3 Compile the weekly team status for you
- 4 Summarize a long report into one page
- 5 Run a SWOT on a competitor or a decision
- 6 Clean up a messy spreadsheet export
- 7 Build a budget or expense tracker
- 8 Compare quotes from three vendors
- 9 Audit and cancel unused subscriptions
- 10 Declutter and re-file a chaotic drive

What an agent can take off your plate

The everyday work that repeats across every business, grouped by what it touches.

Email & Communication

10 IDEAS

The inbox is where most owners lose their morning. These hand it back.

Morning inbox triage and prioritization

START TODAY

Drafting responses in your own writing style

START TODAY

Follow-up tracking for unanswered emails

START TODAY

Meeting request coordination

START TODAY

Weekly communication summaries

START TODAY

Newsletter curation and extraction

START TODAY

End-of-day inbox-zero workflow

START TODAY

Email-to-task extraction and management

SET UP ONCE

Cold outreach response handling

SET UP ONCE

Complaint and escalation responses

SET UP ONCE

Works with: Claude Cowork, ChatGPT / Gemini / Copilot agents, Gmail, Outlook

Document Creation

10 IDEAS

The proposals, SOPs and reports you keep rewriting from a blank page.

Consulting and business proposals

SET UP ONCE

Audit reports and compliance documentation

SET UP ONCE

Board meeting materials and presentations

SET UP ONCE

Standard operating procedures (SOPs)

SET UP ONCE

Client deliverable reports

SET UP ONCE

Case studies

SET UP ONCE

White papers and thought-leadership content

SET UP ONCE

Contracts and agreements from templates

SET UP ONCE

Training materials and guides

SET UP ONCE

Business plans and strategic documents

SET UP ONCE

Works with: Claude Cowork, ChatGPT / Gemini / Copilot agents

File & Folder Management

10 IDEAS

The shared drive nobody has cleaned up since 2019. An agent that actually files things.

Project folder setup

START TODAY

Downloads folder decluttering

START TODAY

Photo and media organization

START TODAY

Folder structure reorganization

SET UP ONCE

Naming convention implementation

SET UP ONCE

Archive and cleanup processes

SET UP ONCE

Duplicate file detection and resolution

SET UP ONCE

Receipt and expense organization

SET UP ONCE

Contract and legal document organization

SET UP ONCE

Knowledge base construction

SET UP ONCE

Works with: Claude Cowork, Google Drive, OneDrive, SharePoint

Content Writing & Repurposing

10 IDEAS

One idea, every channel. Write once, publish everywhere, in your voice.

Summarizing long reports into executive summaries

START TODAY

Writing blog posts from notes and web sources

SET UP ONCE

Writing content in your own voice and tone

SET UP ONCE

Drafting proposals from client briefs

SET UP ONCE

Writing case studies from raw project materials

SET UP ONCE

Building monthly social media content calendars

SET UP ONCE

Writing product descriptions at scale

SET UP ONCE

Writing company newsletters from team updates

SET UP ONCE

Converting meeting transcripts to published content

SET UP ONCE

Adapting one piece of content for many channels

SET UP ONCE

Works with: Claude Cowork, ChatGPT / Gemini / Copilot agents

Research & Analysis

10 IDEAS

The reading and digging that eats an afternoon before you've decided anything.

Survey and feedback analysis

START TODAY

SWOT analysis generation

START TODAY

Market research and industry analysis

SET UP ONCE

Competitive intelligence gathering

SET UP ONCE

Due diligence research

SET UP ONCE

Financial data analysis and reporting

SET UP ONCE

Internal data consolidation

SET UP ONCE

Trend analysis and forecasting

SET UP ONCE

Literature and report review

SET UP ONCE

Pricing and cost analysis

SET UP ONCE

Works with: Claude Cowork, ChatGPT / Gemini / Copilot agents

Workflow Automation

10 IDEAS

The repeating processes that run your week. Onboarding, follow-ups, month-end.

Meeting follow-up workflow

START TODAY

Travel itinerary planning

START TODAY

Weekly team status compilation

START TODAY

New client onboarding workflow

SET UP ONCE

Invoice and receipt processing

SET UP ONCE

Vendor evaluation process

SET UP ONCE

Event planning coordination

SET UP ONCE

End-of-month reporting workflow

SET UP ONCE

New employee welcome package

SET UP ONCE

Quarterly business review preparation

SET UP ONCE

Works with: Claude Cowork, ChatGPT / Gemini / Copilot agents, Slack

Data & Spreadsheets

12 IDEAS

From cleaning a messy export to building a real financial model.

Cleaning messy data (duplicates, formatting)

START TODAY

Building budget or expense trackers

START TODAY

Explaining existing formulas in plain language

START TODAY

Creating readable summaries from raw data

START TODAY

Building dashboards from multi-sheet data

SET UP ONCE

Creating reusable monthly report templates

SET UP ONCE

Writing complex formulas (XLOOKUP, FILTER)

SET UP ONCE

Auditing and fixing broken formulas

SET UP ONCE

Auditing financial models with circular references

BRING IN A BUILD

Building three-statement financial models

BRING IN A BUILD

Scenario analysis and sensitivity tables

BRING IN A BUILD

Writing and documenting VBA macros

BRING IN A BUILD

Works with: Claude Cowork, ChatGPT / Gemini / Copilot agents, Excel, Google Sheets

Browser Automation

10 IDEAS

The copy-paste-from-websites work. Prospecting, monitoring, filing forms.

Multi-provider quote comparison

START TODAY

Apartment or office space research

START TODAY

Subscription audit and cleanup

START TODAY

Competitive price monitoring across sites

SET UP ONCE

Multi-site job posting and applicant tracking

SET UP ONCE

Lead research and contact enrichment

SET UP ONCE

Online reputation monitoring across review sites

SET UP ONCE

Government forms and compliance filings

SET UP ONCE

Social media competitor analysis

SET UP ONCE

Website QA and user-journey testing

SET UP ONCE

Works with: Claude Cowork, Claude in Chrome

Find your business

Whole workflows other owners in your line of work are already running. The tools listed are common starting points, not the only options. The right stack depends on your business, and we'll tell you when a simpler one will do.

Medical & dental — Appointment booking and reminders

Acuity · Calendly · Claude · Twilio

START TODAY

Accounting firm — Document collection workflow

TaxDome · Claude · Zapier · DocuSign

START TODAY

Home services — AI answering and booking

GoHighLevel · Jobber · Claude · Twilio

START TODAY

Nonprofit — Donor CRM and campaign automation

Bloomerang · Salesforce NPSP · Claude · Zapier

START TODAY

Commercial cleaning — Scheduling and on-site verification

Jobber · Claude · Twilio · GPS apps

START TODAY

Real estate brokerage — Lead nurture and follow-up

HubSpot · GoHighLevel · Claude · Zapier

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Law firm — Client intake and case assignment

Clio · Lawmatics · Claude · Make

SET UP ONCE

Construction — Project hub and status updates

Procore · Monday · Claude · Zapier

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E-commerce — AI customer support agent

Zendesk · Gorgias · Claude · Shopify

SET UP ONCE

Insurance — Policy renewal pipeline

AMS360 · HubSpot · Claude · Zapier

SET UP ONCE

Recruiting — Resume screening and shortlisting

Greenhouse · Lever · Claude · Make

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Marketing agency — Automated client reporting

Looker Studio · Supermetrics · Claude · Sheets

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Property management — Maintenance request system

AppFolio · Claude · Twilio · Zapier

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Fitness studio — Member retention automation

Mindbody · Klaviyo · Claude · Zapier

SET UP ONCE

Financial advisor — Client touchpoint automation

Redtail · Wealthbox · Claude · Zapier

SET UP ONCE

Online courses — Engagement and completion nudges

Kajabi · Teachable · Claude · ActiveCampaign

SET UP ONCE

Wholesale & distribution — Order capture and fulfillment

NetSuite · Claude · Zapier · EDI

SET UP ONCE

Auto dealership — Lead scoring and follow-up (BDC)

VinSolutions · DealerSocket · Claude · Zapier

SET UP ONCE

Architecture firm — Time tracking and change orders

Harvest · Monograph · Claude · DocuSign

SET UP ONCE

Logistics & freight — Quoting engine

Salesforce · Claude · Make · Custom APIs

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SaaS — Churn prediction and retention

Mixpanel · Amplitude · Claude · HubSpot

BRING IN A BUILD

Private equity — Deal pipeline operating system

Affinity · Notion · Claude · Zapier

BRING IN A BUILD

Restaurant — Inventory forecasting

Toast · MarketMan · Claude · Make

BRING IN A BUILD

Healthcare — Digital intake and pre-population

Epic · Athenahealth · Claude · Make

BRING IN A BUILD

Manufacturing — Quality-control monitoring

Azure ML · Ignition · Claude · Custom APIs

BRING IN A BUILD

Found three that sound like your week?

That's usually the moment it's worth a conversation. You don't need to know the tools or the tech. You just need to know which slow parts cost you the most.

PATH 1 · TRY IT YOURSELF

Pick a “Start today” idea and hand it to an agent like Claude. The list above is your menu. No permission needed.

PATH 2 · GET A SECOND PAIR OF EYES

Free 30-minute mapping session. You walk away with a written blueprint: what to automate first, what to skip, and what it would cost. No pitch.

Bring your three to a free 30-minute mapping session → headwatersautomation.com

Replace the slow parts, not the people.

headwatersautomation.com