



IDEA GUIDE

We created this idea guide to help spark inspiration. There's likely something here you've been doing manually for years. And with today's AI tools, these are easier than ever to automate.

UNIVERSAL SOLUTIONS

Scheduling & Appointment Management

- **Appointment & Calendar Management:** Handles all scheduling automatically - books appointments from website forms, sends confirmations and reminders, manages cancellations and rescheduling, prevents double-bookings, and syncs across multiple calendars.
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Financial Operations

- **Invoice & Payment Processing:** Extracts data from paper/PDF invoices using OCR, enters information into accounting systems, tracks due dates, sends payment reminders, processes recurring billing, and reconciles payments automatically.
 - **Client Reporting & Dashboards:** Automatically generates client-facing reports, creates performance dashboards, compiles monthly financial statements, and delivers customized reports to different stakeholder groups.
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Marketing & Content

- **Social Media & Content Posting:** Creates and posts content across all social platforms, maintains consistent brand voice, schedules posts for optimal times, and generates captions, hashtags, and basic graphics automatically.
 - **Customer Feedback Analysis:** Collects reviews and feedback from multiple sources, analyzes sentiment and themes using AI, identifies common patterns, and generates monthly summary reports with actionable insights.
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Operations & Inventory

- **Inventory & Stock Monitoring:** Tracks inventory levels across all locations and sales channels, predicts when items will run out, automatically generates reorder alerts, and sends purchase orders to suppliers.
 - **Equipment & Asset Tracking:** Monitors rental equipment, property maintenance items, or valuable assets through check-in/check-out systems, provides live dashboard of availability, and tracks usage patterns.
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Administrative Operations

- **Email & Message Management:** Automatically reads incoming emails/messages, categorizes them by type, responds with appropriate templates, and routes complex issues to the right person. Works across email, SMS, social media, and chat.
- **Daily Business Summaries:** Compiles overnight messages, upcoming appointments, urgent tasks, and key metrics into morning briefings and weekly operational summaries.
- **Customer Service & Experience:** Provides 24/7 customer support through chatbots, handles common questions, processes service requests, sends follow-up surveys, and manages the entire customer journey.





INDUSTRY SPECIFIC IDEAS

Accounting & Bookkeeping

- **Automated Data Entry & Categorization:** Extracts data from receipts, invoices, and bank statements; automatically categorizes transactions and reconciles accounts; processes payroll and tax document collection.
 - **Client Reporting & Tax Preparation:** Generates monthly financial statements, tax reports, and compliance documents; automates client deadline reminders and document requests; creates dashboards for business performance tracking.
 - **Workflow Management:** Manages client onboarding for bookkeeping services; tracks recurring tasks like monthly closes and quarterly reports; automates invoice processing and payment collection for accounting services.
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Financial Services

- **Client Portfolio & Investment Management:** Tracks client portfolios, generates performance reports, and automates rebalancing alerts; manages compliance documentation and regulatory reporting.
 - **Financial Planning & Advisory:** Automates financial plan generation, risk assessments, and goal tracking; manages client meeting preparation and follow-up communications; handles document collection for loan applications or financial planning.
 - **Insurance & Benefits Administration:** Processes policy applications, manages renewal notifications, and handles claims documentation; automates client communications for Medicare, benefits enrollment, or insurance reviews.
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Legal & Professional Services

- **Case & Document Management:** Tracks important deadlines, appointments, and project milestones; organizes documents with proper filing and retrieval; helps with document review and organization (legal work always requires attorney review; business consulting requires professional oversight).
 - **Document Automation:** Creates standard letters, contracts, proposals, and forms from templates; manages version control and compliance requirements; handles secure document storage and client portals.
 - **Client Intake & Communication:** Manages intake processes, onboarding workflows, and client communications; automates routine updates and deadline reminders.
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Real Estate & Property Services

- **Property & Transaction Management:** Handles listings, showings, applications, and lease processes; coordinates maintenance, inspections, and vendor management; tracks deals from inquiry through closing.
- **Market Analysis & Lead Generation:** Generates market reports, property valuations, and competitive analyses; identifies potential buyers/sellers; manages lead scoring and follow-up campaigns.
- **Client & Tenant Relations:** Automates tenant communications, rent collection, and maintenance requests; manages client portals and property owner reporting.

