The 10 Tasks Your Team Should Hand to AI Agents This Week

A free checklist from SmartClick Systems · The 90-Minute Agent Build

Start small. Pick work your team already does every week, with a clear input and an output a person can check in under a minute. An "agent" here is a saved AI setup with instructions for one task. You give it the input, it does the first draft, and a person checks it before it goes anywhere.

Before you start: use only AI tools your company approves, and keep passwords, payment details and confidential customer records out of them.

Sales

1. Turn call notes into a follow-up email draft.

Input: your notes from the call. Output: a short follow-up that recaps what was discussed and the next step. Check: nothing promised that you didn't promise.

2. Prep a one-page brief before a meeting.

Input: the company's website text and your past notes. Output: who they are, what they likely need, three questions to ask. Check: facts match the source.

3. Clean up and summarize your pipeline notes.

Input: messy deal notes. Output: each deal's status, next step and owner in one line. Check: no deal skipped.

Operations

4. Turn a meeting transcript into action items.

Input: the transcript or notes. Output: a list of tasks with owner and due date. Check: every task has an owner.

5. Draft a standard operating procedure from a walkthrough.

Input: someone explaining how they do a task, recorded or typed. Output: numbered steps anyone can follow. Check: the person who does the task reads it once.

6. Write the weekly status update.

Input: this week's notes, tickets or task list. Output: done, in progress, blocked, in a set format. Check: numbers and dates match the source.

Admin and service

7. Sort and summarize incoming requests.

Input: a batch of emails or form submissions. Output: each one tagged by type and urgency, with a one-line summary. Check: urgent items flagged correctly.

8. Draft replies to common questions.

Input: the customer's question plus your approved answers. Output: a reply draft in your company's tone. Check: a person reads it before sending.

9. Pull key details out of documents.

Input: invoices, forms or contracts. Output: the fields you need (names, dates, amounts) in a table. Check: spot-check against the original.

10. Turn a long document into a short summary.

Input: a report, policy or long email thread. Output: five bullet points and any decisions needed. Check: nothing important left out.

Time tally worksheet

Before you build anything, find the task worth starting with. For each task your team does, fill in a row.

Task	Who does it	Times per week	Minutes each time	Minutes per week	Clear input? (Y/N)	Easy to check? (Y/N)

Pick your first agent: the task with the most minutes per week that has a Y in both of the last two columns.

After you build it, time the task again with the agent, including the time to check its work. That's your real number.

Want your whole team to build theirs together?

In The 90-Minute Agent Build, each person brings one task from this list (or their own), and we guide everyone through building, testing and saving a working AI agent in a live, hands-on session. Anyone who leaves without a working agent gets free follow-up build sessions until they have one.

Book a 15-minute fit call: [booking link]

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