Your first small-business AI agent

Smallstep Agent · free checklist

A one-page checklist to go from "I have no clue where to start" to one working assistant in an afternoon.

Before you start: pick one task, not a tool

☐ Write down the one repetitive task that eats your week (follow-up emails, review replies, or social posts are good first picks).
☐ Describe what "done well" looks like in two sentences.
☐ Collect 2–3 real examples of that task done well (past emails, replies or posts you liked).

Set up your assistant

☐ Create an assistant you chat with and give it one job only.
☐ Paste a short role: who it works for, your business, your tone of voice.
☐ List the inputs it needs every time (a customer name, the review text, this week's news).
☐ Connect only the services the task needs (for example Gmail or Google Calendar), and nothing else.

Guardrails (do not skip)

☐ Rule 1: it writes **drafts only**. You approve before anything is sent or posted.
☐ Rule 2: it never invents prices, dates, discounts or promises.
☐ Rule 3: when it is unsure, it asks you instead of guessing.
☐ Rule 4: no customer's private details go into public posts.

Test it like a skeptic

☐ Run it on 5 past examples and compare with what you actually sent.
☐ Try one awkward case (an angry review, a customer who went quiet).
☐ Fix the instructions, not the output. Re-run.

Make it a habit

☐ Once drafts are good 5 times in a row, ask your assistant to set up a routine, for example: "Every weekday at 9 AM, draft follow-ups for yesterday's enquiries and show them to me for approval."
☐ Review the drafts at the same time each day. Approve, edit or discard.
☐ Check monthly: is it still saving you time? If not, narrow the job.

Red flags that mean "stop and simplify"

- It sends anything without you seeing it first.
- You are wiring up five tools before one task works.
- You keep editing most of every draft.

Want the ready-to-paste versions? The Smallstep Agent Starter Kit includes three tested templates (follow-up emails, review and customer replies, social posts) with roles, guardrails and examples.

Works with Grok and other chat assistants. Not affiliated with or endorsed by SpaceXSI.