Build an AI agent for a repeat business task

> *"I keep hearing about AI agents. I want one handling intake and follow-up, but I don't know what an agent actually is or whether I need one."*

Category: operations **Setup Time:** ~90 minutes **Estimated Hours Saved:** 3 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

An AI agent is software that takes an input, decides what to do, calls tools, and produces an output — usually a loop of 'read, decide, act.' For a repeat business task you almost never need a free-roaming agent: a fixed workflow with AI steps (a form submission triggers a model that drafts the reply, checks your calendar, and sends the follow-up) is cheaper, more predictable, and easier to audit. Build the fixed workflow first; graduate to a looser agent only when the task genuinely branches in ways you can't pre-write.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **n8n (self-hosted Community Edition):** **(Free Tier / Wholesale)**
- **Make:** **(Free Tier / Wholesale)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Pick one repeat task with a written checklist**
   An agent automates a process you can already describe. Good first targets: new-lead intake reply, appointment reminder with reschedule handling, invoice follow-up. If you can't write the steps, an agent can't learn them.

2. **Write the workflow as fixed steps first**
   Trigger → gather context → AI step (draft, classify, or summarize) → action (send, book, log) → human checkpoint. Keep the AI's job narrow: drafting and classifying, not free-form decision-making.

3. **Build it in a workflow tool, not a chatbot**
   n8n or Make let you place an AI call as one node inside a fixed flow — you control what triggers it, what data it sees, and what it may send. That is an 'agentic workflow': agent-level help inside rails you set.

4. **Gate anything customer-facing behind a review step**
   Send drafts to yourself or a team inbox first. Auto-send only after two weeks of drafts you would have sent unedited.

5. **Log every run**
   Keep input, output, and timestamp for each execution. When a step misfires, the log tells you whether it was the trigger, the prompt, or the tool call.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: What is an AI agent, exactly?

A: Software that takes a goal, plans steps, calls tools (email, calendar, your CRM), and acts — versus a chatbot that only answers. For most small businesses the useful version is narrower: an AI step inside a fixed workflow, which behaves predictably and bills predictably.

Q: Do I need to code to build one?

A: No. n8n and Make are drag-and-drop canvases with AI nodes. The skill you need is describing the process clearly — the same skill as training a new employee.

Q: When is a real autonomous agent worth it?

A: When the task branches too many ways to pre-write — triaging a shared inbox with ten categories, researching vendors, reconciling mismatched records. Start fixed, measure where it breaks, then widen the agent's freedom one decision at a time.