

PUBLIC EDITION · 2026

The AI Enablement Playbook

for Local Businesses

A practical, no-fluff guide to the AI systems that pay for themselves — what they do, what they cost, what they return, and how to know if your business is ready.

Creatrix — AI systems that earn their keep.
creatrixe.com · hello@creatrixe.com · 604-319-9464
Updated May 2026 · Version 1.0

1. The shift — and why it matters now

For two decades, "enterprise AI" meant a six-figure budget, a data team, a year-long roadmap, and a deployment that was obsolete by the time it shipped. Local businesses watched the largest companies pull further ahead with each cycle and quietly assumed that gap was permanent.

It isn't. The infrastructure that powered the largest corporations a decade ago has been commoditised: large language models you can call by API, customer-data tools that integrate with everything you already use, scheduling and review platforms that talk to each other. The work of running an AI agent — the same kind of agent a Fortune 500 might pay an internal team to build — is now mostly the work of *connecting* things, not building from scratch.

What this means in practice: the small electrical contractor in your neighbourhood, the family restaurant down the street, the two-person physiotherapy clinic — all of them can now run AI systems that genuinely move their numbers. Not "AI" as a marketing label. AI as in: *an agent that answers the phone after hours, captures the lead, qualifies it, and books the callback before the customer goes to a competitor.*

The thesis of this playbook: The local businesses that systematically deploy these agents over the next 24 months will compound a meaningful operational advantage over those that don't. The advantage isn't speculative. It's measurable in monthly recurring revenue, in retention, in hours-saved, in star ratings.

2. The six AI agents that move the needle

Of the dozens of "AI use cases" being pitched to local-business owners right now, six have actually proven themselves at the small-business scale. The rest are either too expensive to operate, too dependent on data you don't have, or too speculative for a serious operator's time.

① Lead Scout Agent

Continuously monitors Google, local directories, and social platforms for people in your service area actively looking for what you do. When intent is detected — a question on a neighbourhood forum, a query on Google Business, a post on a local group — it surfaces it to you in real time.

Best for: Service businesses where being the first to respond matters. Trades, professional services, mortgage brokers, consultants.

Typical lift: 15–25 fresh leads/month a competitor would have caught instead.

② Follow-Up Agent

Auto-contacts every enquiry that didn't book — missed calls, abandoned forms, half-finished bookings, quote requests that went cold. Texts, emails, or WhatsApp depending on what works for your customers. Keeps the cadence appropriate (helpful, not annoying) and stops the moment they engage.

Best for: Any business with measurable inbound leakage. The single highest-ROI agent for most local operators.

Typical lift: 30–40% more enquiries converted.

③ Intake & Triage Workflow

Routes inbound enquiries from every channel (phone, web form, email, Google Business, Facebook, Instagram) into a single qualified pipeline in your CRM. Tags by service type and urgency so your front desk isn't hand-sorting and nothing falls through the cracks.

Best for: Multi-channel businesses where leads currently arrive in five different inboxes that nobody fully reads.

Typical lift: 3–5 hours per week recovered from manual routing.

④ Review & Reputation Agent

Times Google review requests to the moment a customer is most likely to leave a positive one — typically a few hours after a successful service interaction. Pushes negative feedback to you privately first, so you can address it before it becomes a public review.

Best for: Any business where local-pack ranking matters. Plumbers, salons, restaurants, clinics, mechanics, accountants.

Typical lift: +0.3 to +0.5 stars on Google in the first 90 days.

⑤ Scheduling & Dispatch Agent

Smart booking that understands your real constraints — technician availability, drive time, job duration, equipment on-hand. Sends reminders that genuinely reduce no-shows. Auto-fills cancellations from a waitlist. Reschedules cleanly when a job runs over.

Best for: Trades, clinics, salons, mobile-service operators. Anywhere the booking calendar drives the day.

Typical lift: 40–60% fewer no-shows; 1–2 additional jobs per technician per week.

⑥ Reporting & Insight Agent

One short weekly summary in plain English: where leads are coming from, what's converting, what's slowing down, who hasn't been back in 60 days. AI does the analysis; you make the decisions. No dashboards to learn, no spreadsheets to wrangle.

Best for: Owner-operators who don't have time to read dashboards but need to know what's working.

Typical lift: smarter decisions about where to spend time, money, and attention.

3. What this looks like in your industry

The same six agents apply across every local-business category, but the agent *stack* differs. Here's the typical configuration we recommend, and the numbers you should expect, by industry.

INDUSTRY	RECOMMENDED STACK	TYPICAL 90-DAY OUTCOME
Plumbing / Electrical / HVAC	Follow-Up · Intake · Scheduling · Review	20–30% more booked jobs; 1 extra emergency call/week captured
Restaurants / Takeaways	Online Ordering · Review · Follow-Up · Reporting	12–18% larger average order; +0.4 stars; 30% fewer no-shows on bookings
Auto / Mechanical	Follow-Up · Intake · Scheduling · Review	25–35% better quote-to-job conversion; 0.4-star rating lift
Salons / Spas	Scheduling · Review · Follow-Up · Reporting	30–50% fewer no-shows; recover 60-day-lapsed clients; +0.5 stars
Physio / Chiropractic / Wellness	Scheduling · Follow-Up · Review · Intake	25–40% better follow-up booking rate; cleanly-filled cancellations
Accounting / Brokerage / Legal	Lead Scout · Follow-Up · Reporting	1–2 additional high-value clients per quarter; defensible ROI on every \$
Childcare / Tutoring / Education	Follow-Up · Review · Intake	3–5x faster response to enquiries; first-to-respond wins this market

How to read this table: The "outcome" column is what we typically see in the first 90 days when a client runs the recommended stack. Numbers are conservative. The clients that get more out of it are usually the ones who treat the systems as an extension of their team rather than a one-off install.

4. The math — when AI pays for itself

The simplest way to think about whether AI is worth it for your business is to calculate the cost of your current leakage. Three quick exercises:

4.1 The missed-call calculation

1. Estimate calls/week that go to voicemail or get a busy signal: **N**.
2. Estimate the proportion that would have converted if answered: typically **30–40%** for service businesses.

3. Estimate your average ticket: **T**.
4. Monthly leakage: $N \times 4 \times 0.35 \times T$. (For most service businesses this lands between \$2,000 and \$20,000/mo.)

4.2 The cold-quote calculation

1. Quotes you sent in the last month that never converted: **Q**.
2. Realistic recovery rate with consistent follow-up: **10–20%**.
3. Average quote value: **V**.
4. Monthly recoverable revenue: $Q \times 0.15 \times V$.

4.3 The no-show calculation

1. No-shows per week: **S**.
2. Typical reduction with smart reminders: **40–60%**.
3. Revenue per appointment: **R**.
4. Monthly recovery: $S \times 4 \times 0.5 \times R$.

Most operators we work with run these three calculations and arrive at a leakage figure between **\$3,000 and \$40,000 per month** — orders of magnitude larger than the cost of running the agents. AI doesn't print money. It stops the slow leak.

5. Pricing — what it costs to run this

We charge transparently, monthly, no contracts. You can cancel any time. Three tiers; most clients start at Growth and scale up after 60 days.

Starter \$1,000 / mo For solo operators who need one core agent running cleanly. <ul style="list-style-type: none"> • 1 AI agent of your choice • CRM integration • Weekly summary • Email + chat support • Monthly check-in call 	Growth \$1,500–\$2,000 / mo The most common shape — multiple agents working together. <ul style="list-style-type: none"> • 2–3 AI agents • Custom workflow builds • Review & reputation • Priority support • Monthly strategy call 	Scale \$2,500–\$3,000 / mo For multi-location or higher-volume operations. <ul style="list-style-type: none"> • Full agent stack (all 6) • Multi-location coordination • Custom dashboards • Bi-weekly strategy calls • Direct line to your account team
--	---	---

What's not included

Third-party platform fees you already pay (Twilio for SMS, your CRM subscription, your booking software, etc.) stay yours. We don't mark them up. We tell you what they cost up-front during scoping.

What we don't do

- **Long-term contracts.** Monthly billing, cancel anytime. We've never lost a client to contract dates because we don't have any.
- **Free trials.** A free trial of complex AI is dishonest — it shows you a fraction of the value while we build at full cost. Instead: book a 20-minute call where we tell you exactly what we'd build, what it would cost, and what to expect in 30 days.
- **Hidden upsells.** If we recommend an additional service, the recommendation comes with the math: cost, expected return, how we'll measure it.

6. How an engagement actually goes

Week 0 — Discovery (one 20-minute call)

You tell us what your business looks like, where the leakage is, what you've tried. We tell you which agents we'd recommend, what they'd cost, and what to expect in the first 30 days. If we're not the right fit, we'll say so and point you somewhere useful.

Week 1 — Integration mapping

We catalogue the systems you already use (CRM, booking, POS, phone, email) and map how the agents will plug in. You get a one-page summary of exactly what's being connected and what data flows where.

Week 2 — Build & configure

We build the agents, configure them to your workflow, and run them in test mode against historical data so you can see what they would have done last month. You sign off before any agent starts acting on real customers.

Week 3 — Calibration (live, low volume)

Agents go live but we route everything through a review queue first so we can tune wording, timing, and edge cases. Most issues surface in the first 5–10 real interactions and get fixed immediately.

Week 4+ — Live + monthly cadence

Agents run autonomously. You get a monthly strategy call (or bi-weekly on Scale) where we review what's working, what isn't, and what to tune next. You can text your account team directly between calls.

What happens if something breaks

You text us. We respond within business hours, same-day for urgent issues. The agents have automatic fallbacks (e.g. if SMS provider is down, the Follow-Up Agent queues messages instead of dropping them). Production incidents are rare; downtime \geq 1 hour gets a credit.

7. Common questions

Will this work with the systems I already use?

Almost certainly yes. We integrate with major CRMs (HubSpot, Salesforce, Jobber, ServiceTitan, Housecall Pro, Vagaro, Square, Toast, Lightspeed, Cliniko, Jane, etc.), all major booking platforms, and most messaging tools. If you have something custom, we can usually integrate it; we'll tell you on the discovery call what's possible.

Do I need technical staff to use this?

No. We build, deploy, monitor, and maintain everything. Your team uses what they already use; the agents work in the background. You get a dashboard, monthly check-ins, and a real human on the other end.

How is my customer data handled?

Customer data stays in your CRM/system of record. Agents read and write to your tools but don't store customer data in their own databases. Every integration is documented up-front so you know exactly what's flowing where. For health-information businesses (clinics, physios) we layer additional privacy controls and sign appropriate data processing agreements.

What if AI gets something wrong?

It will, occasionally — that's why every agent has tunable confidence thresholds and a review queue for ambiguous cases. The bar is "better than a busy human", which most agents clear comfortably. When something goes wrong, we fix the underlying logic, not just the immediate symptom.

Do you offer free trials?

No. See section 5 — we'd rather have a 20-minute call where we walk through exactly what we'd build for you, what it would cost, and how soon you'd see results. If it's not for you, no follow-up.

What if my business isn't a fit for AI?

Some businesses don't need this yet. Some need a \$50/month tool we don't build. Some need a different consultant. If that's you, we'll say so on the first call. We'd rather lose a deal than ship something you didn't need.

How quickly will I see results?

Lead-capture and follow-up systems show measurable lift in 30–60 days. Review management and scheduling show within the first month. Online ordering, inventory intelligence, and lead-scout systems take 60–90 days for clean numbers. Most clients break even in month one and are net positive by month two.

What's the smallest engagement you'll take?

\$1,000 CAD per month. Below that we can't build something we'd be proud to put our name on.

8. What to do next

If you've read this far and you think there might be something here for your business, the lowest-friction next step is a 20-minute call. No slides, no funnel, no follow-up if you decide it's not for you. We'll walk through:

- What your current lead flow looks like and where it's leaking.
- Which 1–3 agents would have the most impact for *your* specific business.
- What it would cost, in real numbers, and what to expect in the first 30 days.
- How to know whether AI is the right call right now (vs. waiting six months).

Three ways to reach us



Call or text

604-319-9464 — fastest path



Book directly

calendly.com/ameed-ansari/hello — 20-minute slot, your timezone



Email

hello@creatix.com — we reply within one business day

Thanks for reading. Even if you never become a client, we hope this gave you a clearer picture of what AI can — and can't — do for a local business in 2026.

— The team at Creatrix