



150 AGENT IDEAS FOR LOCAL BUSINESSES

Find the work worth automating.
Prove the value. Keep people in control.



GUS SANCHEZ + JULIAN SANCHEZ

Founders, Technology Alliance Group



A simpler way to a more productive business.

We started TAG because we kept seeing the same problem: good businesses held back by repetitive work, missed opportunities and tools that do not talk to each other.

This guide gives you 150 practical starting points. You do not need all of them. You need the right first workflow.

TAG FIELD NOTE

If a grandmother running the business can explain what it does, and a president can explain what it is worth, you are probably solving the right problem.

START → PROVE → EXPAND

Connect what you have. Create value now. Add intelligence as you grow.

Gus Sanchez & Julian Sanchez

Founders, Technology Alliance Group

Why This Matters Now

Businesses are not short on software. They are short on capacity.

53%

SMB leaders say productivity must increase.

24%

SMBs were already using agents.

79%

planned implementation within 12–18 months.

DO THIS

Do not ask where to add an agent. Ask where work repeatedly slows down, falls through the cracks, or forces a person to copy information.

WORKFLOW > CHATBOT

The value appears when the system takes a useful next step, not merely answers a question.

Source: Microsoft 2025 Work Trend Index and SMB companion infographic.

The Grandma Test

If you cannot explain it in one breath, it is not ready to build.

1

WHEN

A customer calls and nobody answers.

2

KNOW

Who called? What do they need? Are we open?

3

DO

Text back, ask two questions, offer a booking.

4

CHECK

Escalate emergencies, exceptions or sensitive decisions.

5

PROVE

How many missed calls became booked jobs?

SIMPLE IS A FEATURE

Trigger → context → action → human checkpoint → measurable result.

Automate the Boring. Protect the Important.

GOOD FIRST TARGETS

- ✓ Missed calls
- ✓ Scheduling
- ✓ Intake & documents
- ✓ Follow-up
- ✓ Status updates
- ✓ Summaries & handoffs
- ✓ Routine reminders
- ✓ Routing

KEEP HUMAN CONTROL

- Medical diagnosis
- Legal / coverage advice
- Negotiation & contracts
- Unusual refunds
- High-dollar commitments
- Safety-critical decisions
- Anything you cannot explain or audit

WATCH THIS

Autonomy is not the goal. Business value is. Keep approvals around sensitive, regulated, high-value or irreversible actions.

Source: OpenAI, A Business Leader's Guide to Working with Agents.

Pick the First Workflow

High value + ready now beats impressive + complicated.

PLAN NEXT

High value, more setup

START HERE

High value, ready now

IGNORE

Low value, not worth it

QUICK WIN

Lower value, easy to prove

SCORE IT

$\text{Pain} \times 2 + \text{Frequency} + \text{Actionability} + \text{Readiness} + \text{Time-to-Value} - \text{Risk}$

Pick one. Prove it. Then expand.

Prove the Money

Use the same math before and after the pilot.

MISSED OPPORTUNITY

Missed leads × realistic conversion × average gross profit

LABOR

Minutes saved × monthly volume × loaded hourly cost ÷ 60

CAPACITY

Recovered appointments/jobs × contribution per slot

RETENTION

Customers saved × remaining customer value

ILLUSTRATIVE EXAMPLE

100 missed calls × 30% qualified × 40% booking × \$250 gross profit = \$3,000/month opportunity.

Use your real numbers. This is a calculation example, not a TAG customer result.

Restaurants

Fill more seats. Lose fewer inquiries.

PRIMARY KPI

Booked covers

CONNECT

POS + reservations + phone/SMS + CRM

1. Reservation Recovery

PAIN Missed callers disappear during the rush.

ACTION Reply instantly, capture party/date/time, offer valid slots.

MEASURE Missed-call booking rate

2. No-Show Prevention

PAIN Empty tables are perishable capacity.

ACTION Confirm, remind and make rescheduling easy.

MEASURE No-show rate

3. Catering Qualifier

PAIN Event leads arrive incomplete.

ACTION Collect date, headcount, budget and needs before handoff.

MEASURE Qualified catering leads

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Restaurants: Opportunity Map

Circle three. Score them. Pick one.

001 Reservation Recovery

002 Menu & Allergen Guide

003 Catering Qualifier

004 Waitlist Optimizer

005 No-Show Prevention

006 VIP Guest Context

007 Review Recovery

008 Order Status

009 Private Event Booking

010 Inventory Alert

011 Supplier Reorder Prep

012 Shift Handoff

013 Daily Sales Brief

014 Lapsed Guest Win-Back

015 Local Promotion Planner

016 Staff Coverage Assistant

017 Manager Action Board

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Salons & Beauty

Fill more chair time. Keep clients coming back.

PRIMARY KPI

Chair utilization

CONNECT

booking + POS + CRM + SMS

1. Cancellation Fill

PAIN Late cancellations create unsold chair time.

ACTION Match openings to eligible waitlist clients.

MEASURE **Recovered appointment value**

2. Rebooking

PAIN Good clients drift when nobody asks.

ACTION Prompt at the recommended service interval.

MEASURE **Rebook rate**

3. No-Show Prevention

PAIN Unused chair time disappears forever.

ACTION Confirm and remind based on appointment risk.

MEASURE **No-show rate**

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Salons & Beauty: Opportunity Map

Circle three. Score them. Pick one.

018 Smart Booking

019 No-Show Prevention

020 Cancellation Fill

021 Rebooking

022 Consultation Intake

023 Service Recommendation

024 Retail Follow-Up

025 Membership Renewal

026 Client Recovery

027 Waitlist Manager

028 Gift Card Concierge

029 Client Note Summary

030 Inventory Watch

031 Referral Workflow

032 Review Request

033 Front Desk Brief

034 Retention Risk

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Dental & Medical

Reduce admin. Protect clinical judgment.

PRIMARY KPI

Schedule utilization

CONNECT

practice system + forms + portal

1. New Patient Intake

PAIN Front desks chase basic information.

ACTION Collect forms before arrival; flag exceptions.

MEASURE **Pre-visit completion**

2. Recall Reactivation

PAIN Overdue patients quietly leave the schedule.

ACTION Identify overdue patients and start approved outreach.

MEASURE **Recall booking rate**

3. Cancellation Refill

PAIN Clinical capacity opens with little warning.

ACTION Offer the slot under scheduling rules.

MEASURE **Recovered chair time**

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Dental & Medical: Opportunity Map

Circle three. Score them. Pick one.

035 New Patient Intake

036 Appointment Matching

037 No-Show Prevention

038 Recall Reactivation

039 Referral Intake

040 Document Collection

041 Insurance Intake

042 Estimate Follow-Up

043 Cancellation Refill

044 Billing FAQ

045 Post-Visit Check-In

046 Care Plan Reminder

047 Patient Feedback

048 Internal Handoff

049 Operations Brief

050 Missed-Call Recovery

051 Referral Relationship Brief

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Plumbers & Trades

Answer more calls. Book more jobs.

PRIMARY KPI

Booked jobs

CONNECT

phone + CRM + field service

1. Missed-Call Recovery

PAIN High-intent callers move to the next company.

ACTION Text back, capture job type/urgency and offer next step.

MEASURE Missed-call booking rate

2. Quote Intake

PAIN Estimators waste time collecting basics.

ACTION Collect scope, photos and timing before review.

MEASURE Quote prep time

3. Estimate Follow-Up

PAIN Open estimates die from inconsistent follow-up.

ACTION Trigger follow-up and alert staff at buying intent.

MEASURE Estimate close rate

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Plumbers & Trades: Opportunity Map

Circle three. Score them. Pick one.

052 Missed-Call Recovery	053 Emergency Intake
054 Quote Intake	055 Job Booking
056 Dispatch Brief	057 ETA Updates
058 Parts Readiness	059 Estimate Follow-Up
060 Invoice Follow-Up	061 Maintenance Reminder
062 Membership Renewal	063 Property Manager Intake
064 Photo Intake	065 Lead Qualification
066 Review Request	067 Technician Handoff
068 Daily Operations Brief	

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Gyms & Fitness

Convert more trials. Catch churn sooner.

PRIMARY KPI

Trial conversion

CONNECT

membership + check-in + billing

1. Trial Booking

PAIN Interest fades before the first visit.

ACTION Offer trial times and send preparation details.

MEASURE **Inquiry-to-trial rate**

2. Lead Nurture

PAIN Prospects disappear after a tour.

ACTION Follow up based on goals and objections.

MEASURE **Tour-to-member conversion**

3. Member Re-Engagement

PAIN Churn starts before cancellation.

ACTION Detect declining attendance and queue outreach.

MEASURE **Reactivation rate**

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Gyms & Fitness: Opportunity Map

Circle three. Score them. Pick one.

069 Membership Inquiry

070 Trial Booking

071 Class Booking

072 Lead Nurture

073 Member Re-Engagement

074 Renewal Workflow

075 Training Intake

076 Goal Check-In

077 Referral Workflow

078 Billing Support

079 Waitlist Manager

080 Onboarding

081 Failed-Payment Recovery

082 Challenge Promotion

083 Program FAQ

084 Review Request

085 Retention Brief

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Real Estate

Respond faster. Keep long-cycle leads moving.

PRIMARY KPI

Appointments

CONNECT

CRM + MLS + calendar

1. Buyer Qualifier

PAIN Agents spend time discovering basic fit.

ACTION Capture location, budget, timing and financing.

MEASURE **Qualified buyer rate**

2. Missed-Call Recovery

PAIN Sign and property calls are perishable.

ACTION Respond instantly and route to the right agent.

MEASURE **Recovered lead rate**

3. Open-House Follow-Up

PAIN Attendance is not the same as intent.

ACTION Capture feedback and prioritize serious buyers.

MEASURE **Open-house conversion**

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Real Estate: Opportunity Map

Circle three. Score them. Pick one.

086 Buyer Qualifier	087 Seller Qualifier
088 Property Match	089 Showing Coordinator
090 Listing FAQ	091 Open-House Follow-Up
092 Lead Nurture	093 Missed-Call Recovery
094 Inspection Organizer	095 Document Chase
096 Milestone Concierge	097 Market Brief
098 Past-Client Nurture	099 Review & Referral
100 Agent Handoff	101 Listing Performance
102 Database Opportunity	

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Coaches & Consultants

Less coordination. More advising.

PRIMARY KPI

Close rate

CONNECT

CRM + calendar + notes

1. Discovery Call Qualifier

PAIN Calendars fill with low-fit conversations.

ACTION Collect goals, urgency, budget and fit before booking.

MEASURE Qualified discovery rate

2. Session Recap

PAIN Useful decisions disappear into notes.

ACTION Turn notes into decisions, owners and deadlines.

MEASURE Recap prep time

3. Proposal Follow-Up

PAIN Good proposals go quiet.

ACTION Track status and trigger relevant follow-up.

MEASURE Proposal close rate

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Coaches & Consultants: Opportunity Map

Circle three. Score them. Pick one.

103 Discovery Call Qualifier

104 Client Intake

105 Proposal Follow-Up

106 Session Prep

107 Session Recap

108 Action Tracker

109 Resource Delivery

110 Testimonial Request

111 Renewal Workflow

112 Lead Nurture

113 Content Repurposing

114 Community Triage

115 Payment Reminder

116 Progress Check-In

117 Referral Workflow

118 Client Health Brief

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Agencies

Tighten intake, approvals and handoffs.

PRIMARY KPI

Cycle time

CONNECT

CRM + projects + email

1. Brief Intake

PAIN Teams start with incomplete briefs.

ACTION Structure requests and flag missing inputs.

MEASURE **Brief completeness**

2. Client Onboarding

PAIN Access and assets arrive piecemeal.

ACTION Track prerequisites before kickoff.

MEASURE **Time-to-kickoff**

3. Content Approval

PAIN Projects stall waiting for decisions.

ACTION Track reviewers, reminders and approval state.

MEASURE **Approval cycle time**

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Agencies: Opportunity Map

Circle three. Score them. Pick one.

119 Lead Qualification

120 Brief Intake

121 Proposal Follow-Up

122 Client Onboarding

123 Task Handoff

124 Meeting Recap

125 Content Approval

126 Campaign Summary

127 Invoice Follow-Up

128 Review Request

129 Client FAQ

130 Support Triage

131 Expansion Signal

132 Renewal Workflow

133 Asset Collection

134 Capacity Brief

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

Insurance

Respond faster. Keep licensed people in control.

PRIMARY KPI

Quote conversion

CONNECT

CRM + agency system + phone

1. Quote Intake

PAIN Producers lose time gathering basics.

ACTION Collect approved details and create a complete handoff.

MEASURE **Quote-ready lead rate**

2. Missed-Call Recovery

PAIN A prospect often calls the next agency.

ACTION Respond immediately and route to licensed staff.

MEASURE **Recovered inquiries**

3. Renewal Review

PAIN Renewals become urgent too late.

ACTION Flag renewals and prepare an account-review brief.

MEASURE **Renewal retention**

EXECUTIVE QUESTION

Which one of these three problems costs us the most today?

Insurance: Opportunity Map

Circle three. Score them. Pick one.

135 Quote Intake	136 Missed-Call Recovery
137 Renewal Review	138 Policy FAQ
139 Document Collection	140 Cross-Sell Signal
141 Lead Qualification	142 Appointment Scheduling
143 Claim Intake Support	144 Payment Reminder
145 Coverage Review Signal	146 Life-Event Signal
147 Referral Workflow	148 Review Request
149 Producer Handoff	150 Retention Risk

NEXT MOVE

Take the highest-scoring idea and map the real workflow before choosing technology.

30-Day Pilot

Start narrow. Learn fast. Expand only after value is proven.

DAYS 1–3

Pick one workflow. Establish the baseline. Map current steps and failure points.

DAYS 4–7

Map systems, fields, permissions, hard rules and human approvals.

WEEK 2

Build the happy path plus exception routing. Log every action.

WEEK 3

Run on a small slice. Review failures daily. Keep people in the loop.

WEEK 4

Compare to baseline. Calculate value. Scale, redesign or stop.

START WHERE YOU ARE.

Connect what you have. Create value now. Add intelligence as you grow.

Sources & Method

Verified research used in this edition:

Microsoft, 2025 Work Trend Index SMB infographic: 53% of SMB leaders say productivity must increase; 24% of SMBs were already using agents; 79% planned implementation within 12–18 months.

OpenAI, A Business Leader's Guide to Working with Agents and A Practical Guide to Building Agents: guardrails, approved data sources, human intervention and oversight for sensitive or high-risk actions.

Storytelling with Data: decluttering and focusing attention improves clarity, professionalism and recall. This publication uses one dominant message per page, direct annotations and restrained color to direct attention.

METHODOLOGY

The 150 ideas are TAG opportunity patterns, not claims that every business should deploy them. Every workflow must be adapted to the company's real systems, policies, permissions, economics

THE TAG STANDARD

Claim → Evidence → Business Meaning → Action.