



Unlocking AI: A Simple and Practical Guide for Home and Professional Services

Use technology to save more time and money



INTRODUCTION

A Note from Thryv's President

AI is fast becoming a powerful tool that's accessible to businesses of all sizes.

Most importantly, AI is for everyone — including you.

But in the past year alone, absorbing the emerging benefits of AI can feel like drinking from a firehose. When you're responsible for all aspects of a business — from business strategy to customer relations to growth marketing — it's understandable you might not have time to spend learning the ins and outs of AI.

At Thryv, we understand that. You wear many hats and “AI expert” might not be one of them. (At least, not yet.)

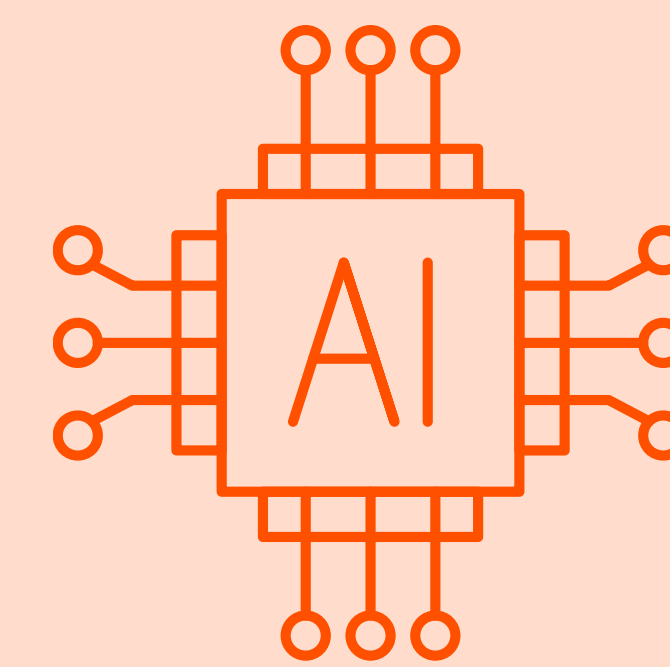
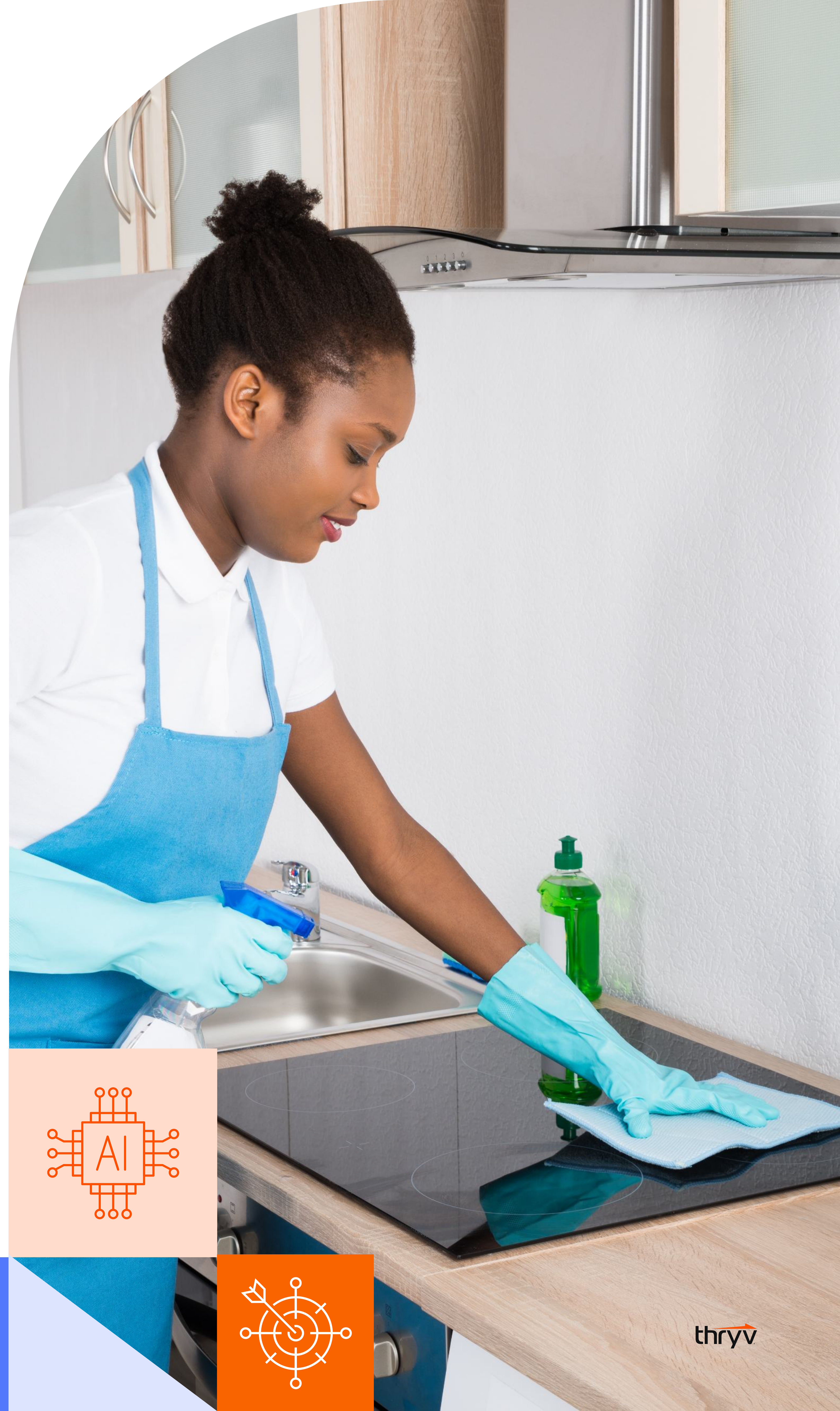
That's why we've tapped our own internal AI experts to share the AI information that's most helpful to you.

In this guide, we will show you how AI can help home and professional services business owners like you compete, save time and future-proof your business. I invite you to read on and learn more about AI and how you can begin to use it at your growing business.

Thryv is committed to your success.

Remember, we're here to help remove the busy work of running your business, because we know the value of your time and expertise.

[Grant Freeman](#), Thryv President



What Exactly Is Artificial Intelligence?

AI is technology or software that helps other tools improve upon themselves or work more efficiently. Similar to how humans think and act, AI can automate tedious or mundane tasks more efficiently without a lot human intervention.

Here's an example:



Without AI, a customer relationship management (CRM) platform might not understand and respond to customer inquiries in the most meaningful way. For example, if a customer asks about an estimate or a product return policy, a non-AI system is less likely to be able to interpret the question and provide an appropriate response.



However, with AI (like a chatbot), the platform can understand the customer's question, interpret their intent and provide a relevant answer. It could also handle follow-up questions and provide personalized assistance based on past conversations or if appropriate, connect the customer to a human.

AI levels the playing field, making it possible for smaller organizations to compete in spaces previously limited to larger competitors.

Let's explore that.



The **benefit of AI** for Small Businesses? Instead of devoting staff to answering customer questions, scheduling appointments, and analyzing data, **AI can do these tasks** for you.



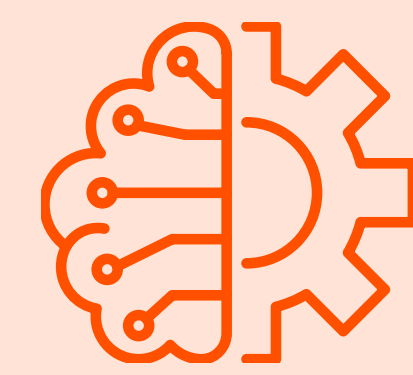
Help is on the Way.

At the moment, it might seem like all everyone is talking about is AI, making it feel like a lot of hype. In the rush to incorporate AI into everything, it can be easy to just bury your head and proceed with business as usual.

Thryv's advice? Incorporate AI, but do so thoughtfully.



First, here are four benefits of using AI at work:



1. Streamline tasks

AI automates routine tasks, reduces human errors and frees your team to focus on more strategic work.



2. Boost productivity

By handling repetitive tasks, AI allows employees to concentrate on higher-value activities, increasing overall efficiency and output.



3. Enhance security

AI can monitor systems for threats in real time, offering proactive protection against cyber risks and attacks.



4. Gain a competitive advantage

AI can provide insights from data to help you make better decisions, deliver personalized customer experiences and reduce costs.

Great AI Starting Points for SMBs

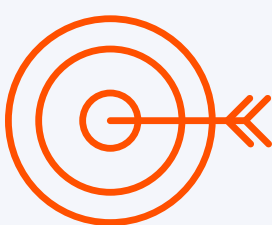
Excited about AI but unsure where to start first? You’re not alone. Let’s start with the basics.

If you’re unsure where to use AI, a good rule of thumb is to identify the items and tasks in your business that are the most time-consuming. These are your immediate business needs and will be the most impactful areas to tackle first.

While every business is different, these are some of the most common challenges SMBs face today — and excellent starting points for incorporating AI.



Common business challenges SMBs face and their causes

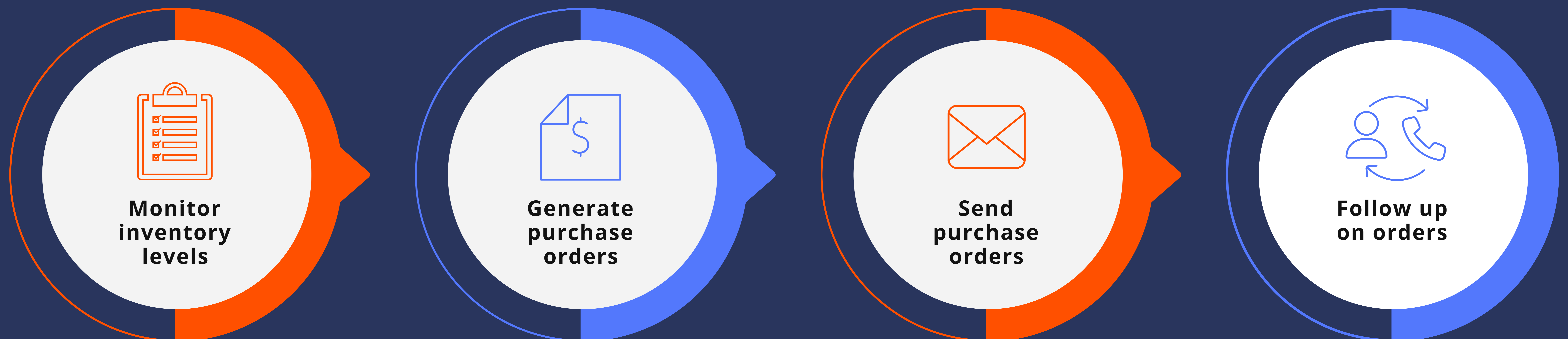
Business Challenge	Issue	Cause
 Inefficient Operations	Manual processes that take valuable time.	Data entry and paper-based workflows.
 Customer Service Delays	Difficulty managing customer inquiries promptly.	Phone tag with customers, email overload, and limited customer service resources such as staff.
 Minimal Marketing Reach	Struggle to effectively reach and engage with target audiences.	Limited budgets, ineffective marketing and sales channels like print ads or cold calling, limited social media presence.
 Data Management Issues	Challenges organizing and analyzing business data.	Inability to track marketing performance due to lack of data analysis tools and expertise.
 Resource Constraints	No way to implement new technologies and systems.	Insufficient IT resources, such as staff, budget, or expertise to implement new technologies or systems.

If you identify with any of these business pain points, AI can help. Keep reading for some specific use cases where AI can give your business a boost.

Why Should You Use AI in Your Workflows?

First, let's define what comprises a workflow. "Workflow" simply refers to a process that moves data from one step to the next.

Reordering stock is an example of a common workflow.



Your business also consists of many workflows, whether that's managing employees and finances, or marketing and providing work estimates.

Incorporating AI can help you streamline how work gets done at your business.

10 Examples of Workflows Perfect for AI

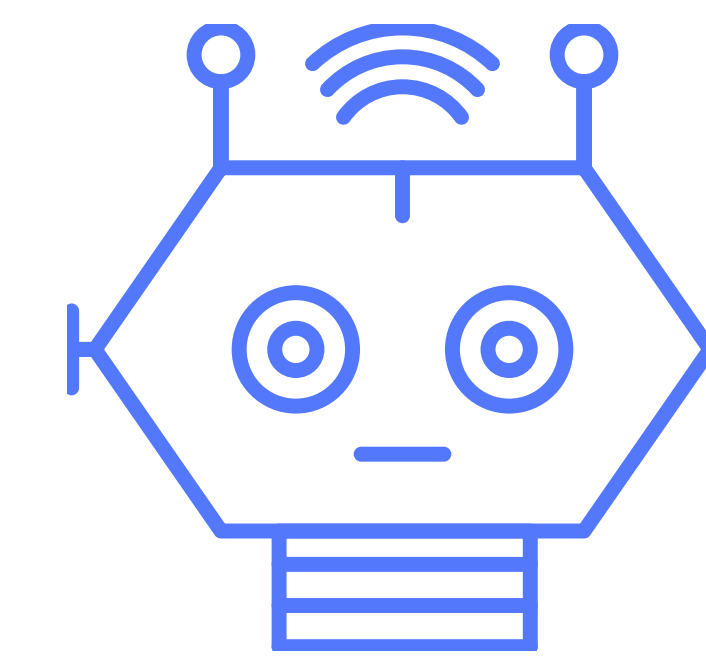
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Business Processes

AI tools can help you accurately forecast sales and manage inventory. They can also optimize supply chain operations to reduce waste and improve efficiency.

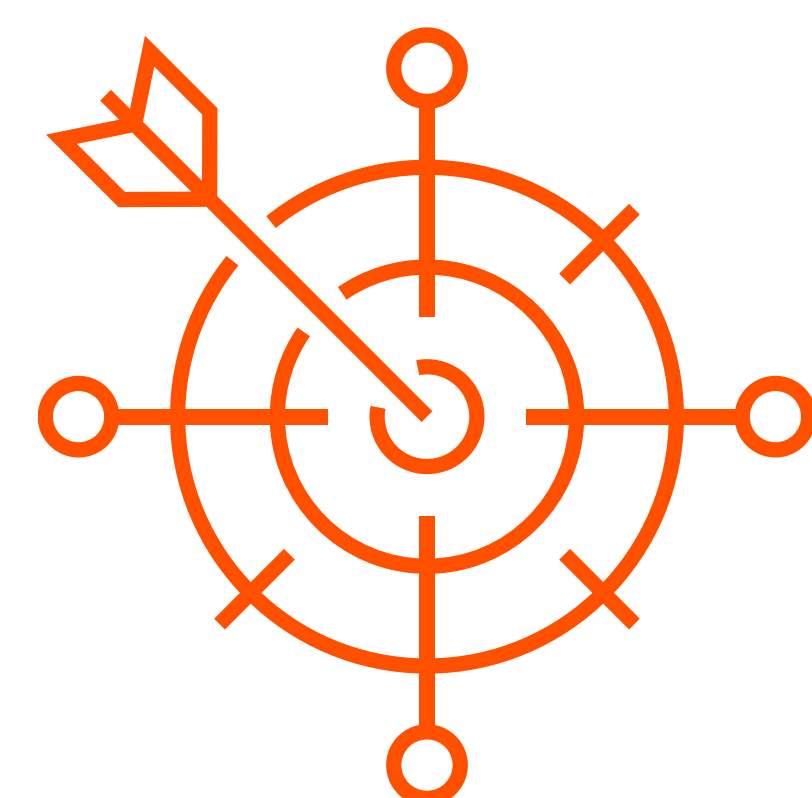
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Customer Service

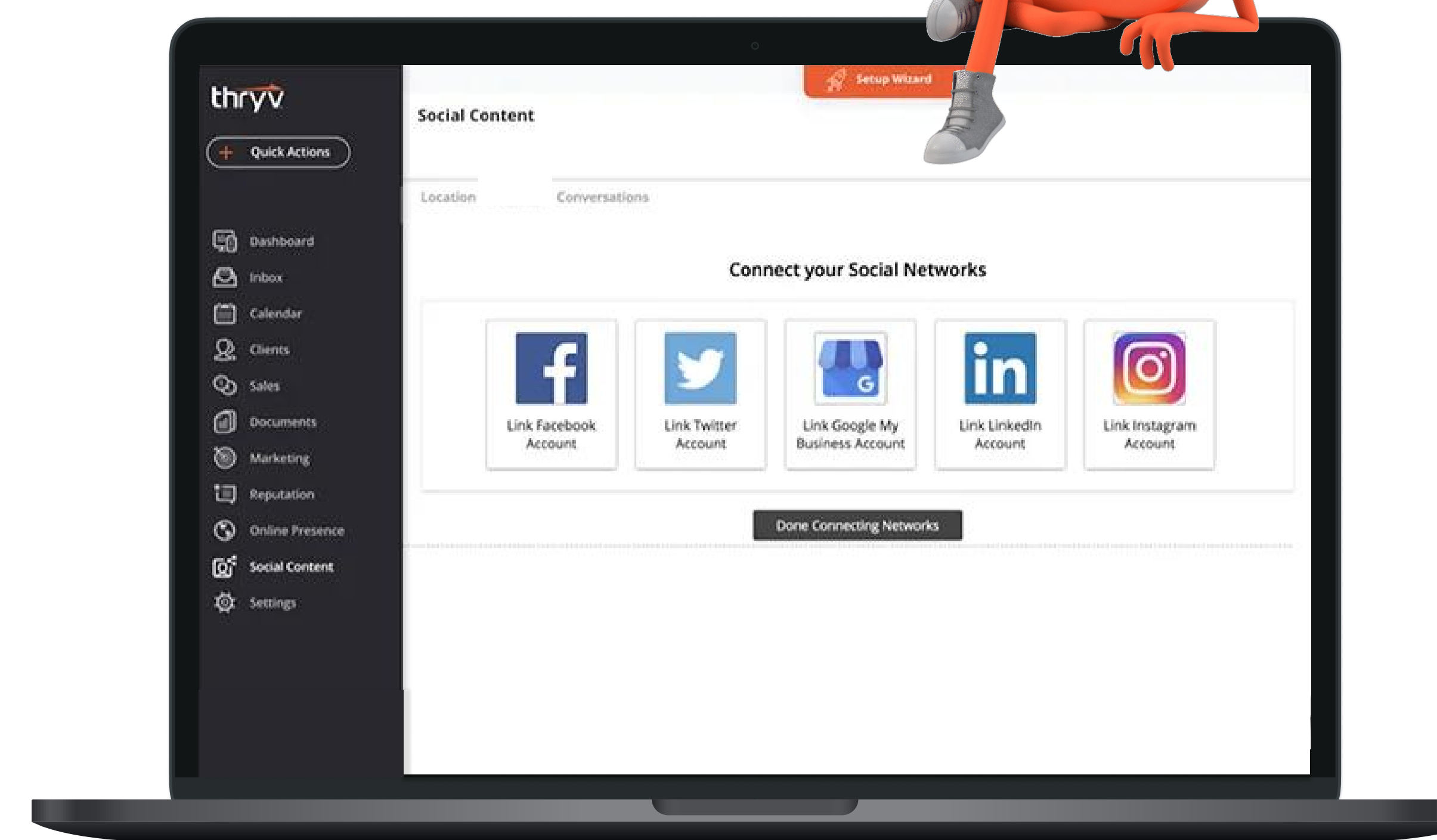
AI-powered chatbots can offer personalized, 24/7 customer support, and automate scheduling and booking. They can also analyze customer interactions and adjust appropriately to improve service quality and customer satisfaction.

3



Social Media

AI tools can do the data Managing social media doesn't have to take a ton of time. With the help of AI, it can actually be fun — and fast. Instead of creating individual posts customized for each specific platform (such as Twitter, Facebook and Instagram), and then posting each one, an AI social media management tool can do it for you, at once, in a single location.



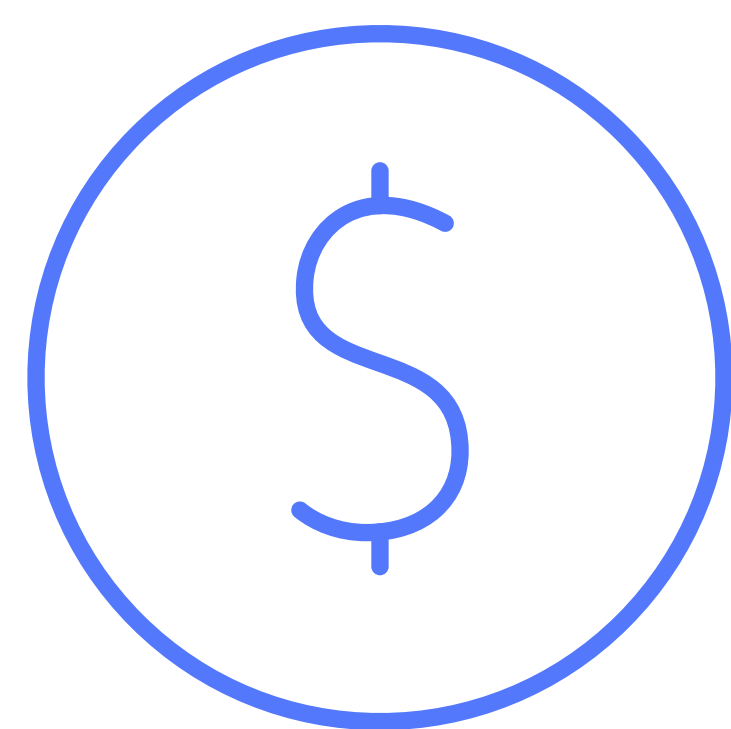
Social Media Management

Besides creating and posting engaging content,

AI social media software can also automatically customize your social content based on the platform (including suggesting appropriate hashtags and emojis 😊!) Best of all, you can schedule your posts, so you can set it and forget it with the knowledge that the time AI suggests is the best time for your audience on that platform.

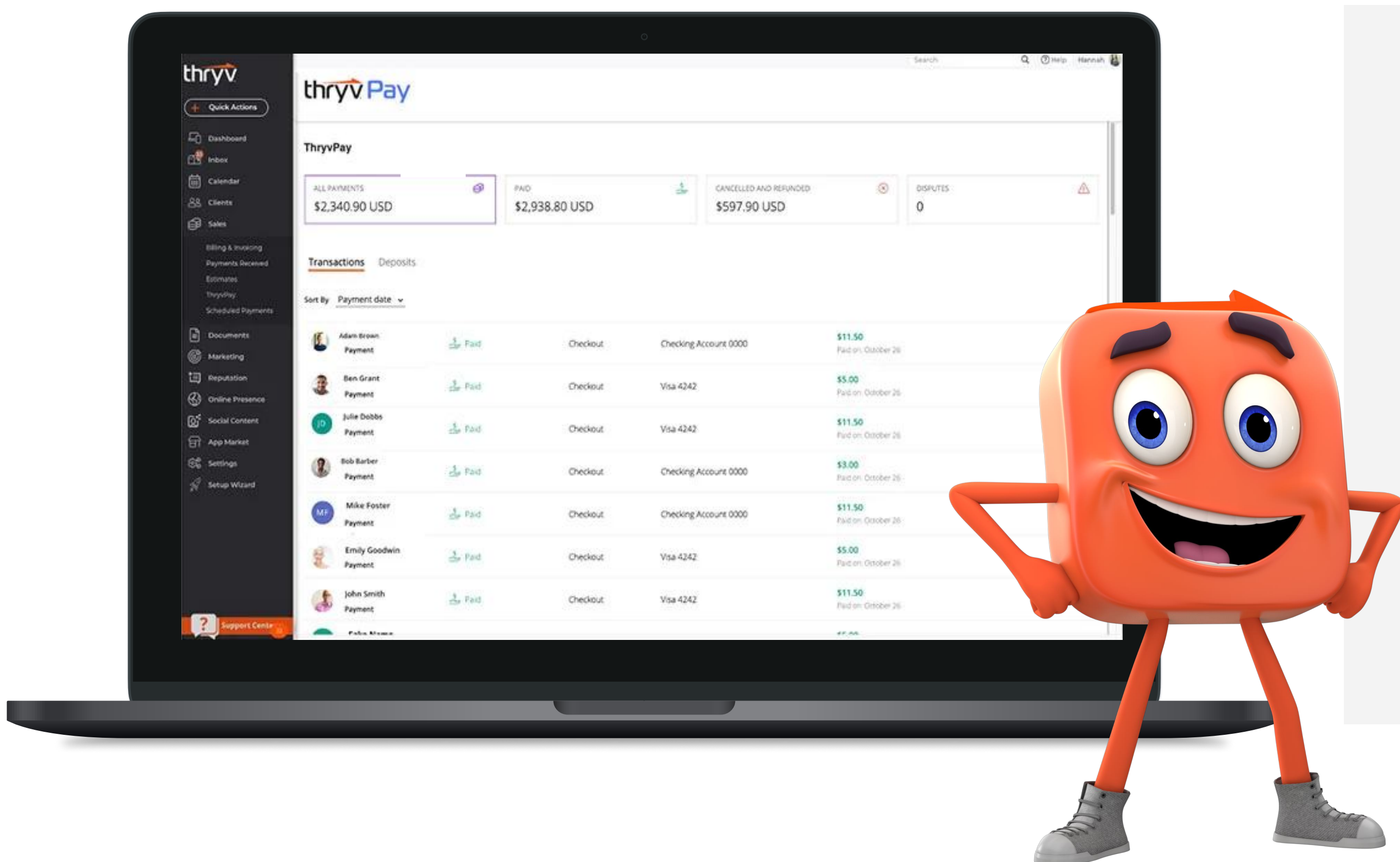
10 Examples of Workflows Perfect for AI

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Accounting Tasks

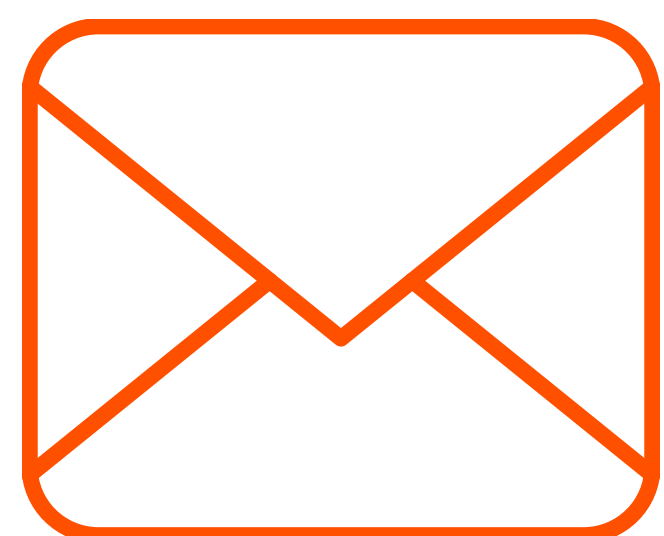
Using AI to manage accounting tasks helps keep precise bookkeeping and financial analysis — without costly mistakes that humans often make. Automated invoicing and expense tracking also streamline financial operations.



ThryvPay

AI can [automate payment collections](#) so you don't have to write invoices or follow up on overdue payments.

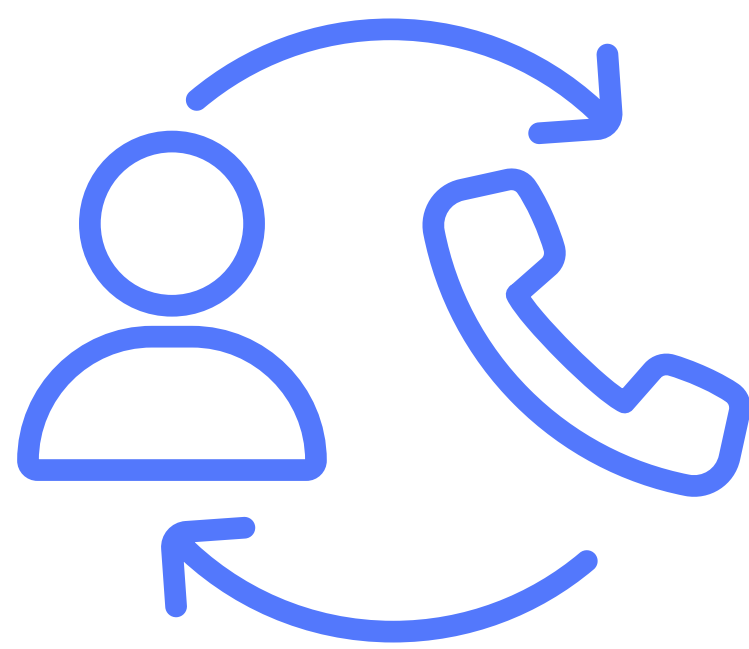
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Email Marketing

Send more personalized emails to your customers at the ideal time they will open them. AI can also group your customers by behavior (for example, those who have made a purchase in the past 30 days) so you can send them more targeted messages.

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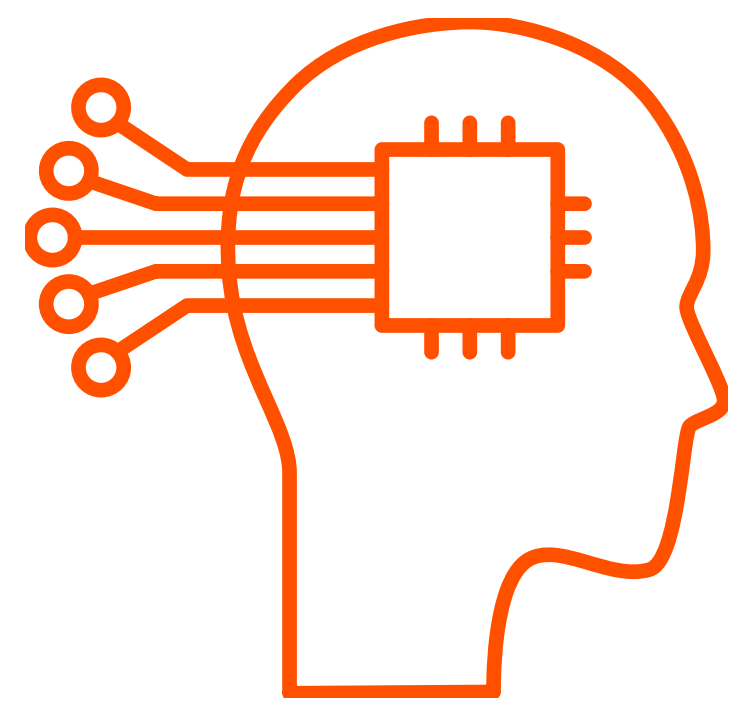


Improve Lead Follow-up

Let AI help you follow up with leads in a more personalized and effective way. AI can help you focus on the most promising leads, so you can spend your time on the ones most likely to become customers.

10 Examples of Workflows Perfect for AI

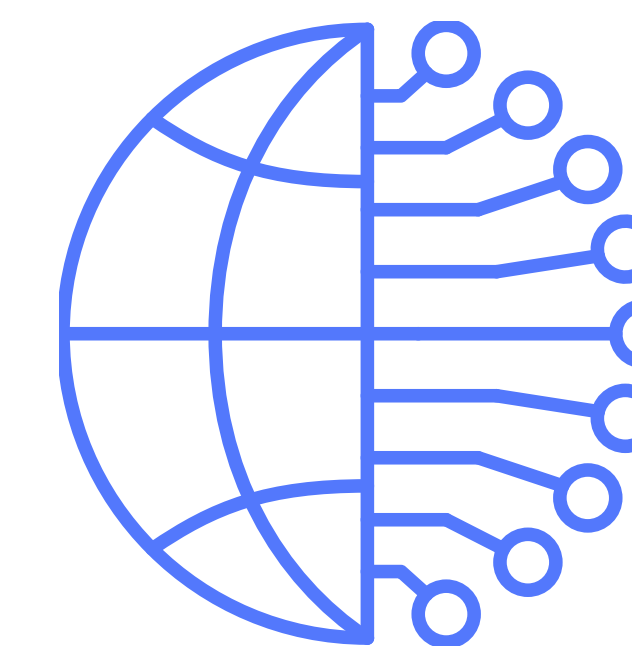
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Predict Customer Behavior

Give customers what they want before they even ask for it. By looking at your past data, AI can indicate which products or services are most likely to sell well, to whom and when. With these insights, you can stay ahead of the competition and drive growth for your business.

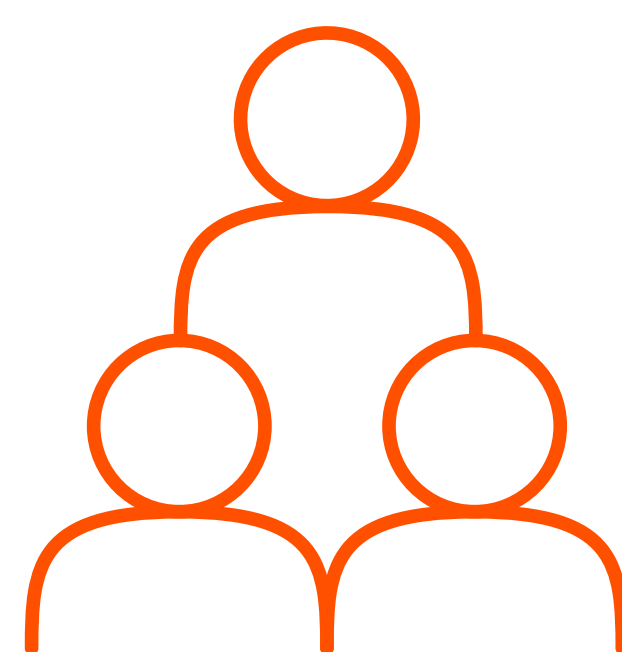
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Analyze Communication

Use AI to analyze your business communications and identify what's working and what's not. For example, you might discover that your sales team is spending too much time on phone calls that don't lead to sales, and use this insight to focus on more effective outreach strategies.

9



Streamline HR

Use AI to help you manage HR tasks, like onboarding new employees and processing time-off requests, so you can focus on running your business. This way, you can save time and energy, and still take care of your employees.

10



Support Decision-Making

AI-driven tools can analyze data faster and more accurately than any human, letting you make decisions and optimize strategies in near real time. These tools can also identify market opportunities and threats — before your competitors do.

AI in the Workplace: Separating Fact from Fiction

But first, let's discuss the elephant in the room.

As AI becomes more commonplace in business, you may be wondering about its real impact.

Can AI replace entire employees? Will it make certain jobs obsolete?

For home and professional services businesses like yours, the reality of AI is far more nuanced and positive. AI isn't about replacing your field technicians. Instead, it's a powerful tool that can make their jobs easier, more efficient and more productive.

Let's dive into three common myths about AI and uncover the truths that matter for your business:



3 Common Myths About AI

Myth

AI can replace employees



Fact

AI is designed to complement human capabilities, not replace them. It can assist with repetitive and mundane tasks but it won't completely replace your services employees.

Myth

AI is too complicated for small businesses



Fact

Many AI tools (such as ChatGPT) are user-friendly and tailored for small business use, with little-to-no technical expertise required.

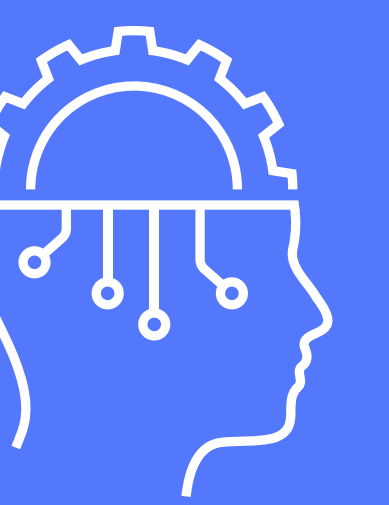
Myth

AI is only for big companies



Fact

AI solutions are scalable and can be implemented in businesses of all sizes to improve efficiency and productivity.





Wrong Ways to Use AI

As A Total Replacement for Human Interaction

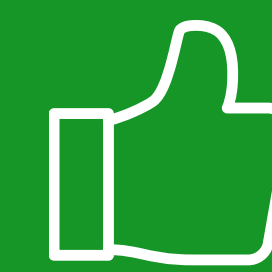
Use case: Using AI chatbots to completely replace humans — especially when it comes to customer service — can lead to a lack of personal touch, inaccurate information and customer dissatisfaction (not to mention damage to your brand.)

Over-Automation

Use case: Automating processes such as inventory management and invoicing without proper oversight can lead to errors and reduced quality of service. AI is not a “set-it-and-forget-it” tool.

As a Quick Fix

Use case: Expecting AI to solve all business problems without fully understanding its capabilities (and limitations) can lead to disappointment, errors and frustration.



Right Ways to Use AI

Enhancing Customer Experiences

Use case: Using AI to provide instant responses to common customer inquiries while ensuring complex issues are handled by human representatives.

Improving Efficiency

Use case: Automating repetitive tasks such as scheduling and invoicing to free up time for employees to focus on more important tasks.

Data-Driven Decision Making

Use case: Using AI to analyze customer data and provide insights that inform marketing strategies and business decisions.

Supporting Employees

Use case: Providing AI tools that help employees perform their tasks more efficiently, such as predictive maintenance tools for HVAC technicians.

Ultimately, AI is a tool to help SMBs grow and succeed. By understanding how to use AI correctly, you can leverage its benefits while maintaining the human touch that keeps customers satisfied and your business an ongoing success.



CONCLUSION

Ready to Give AI a Try?

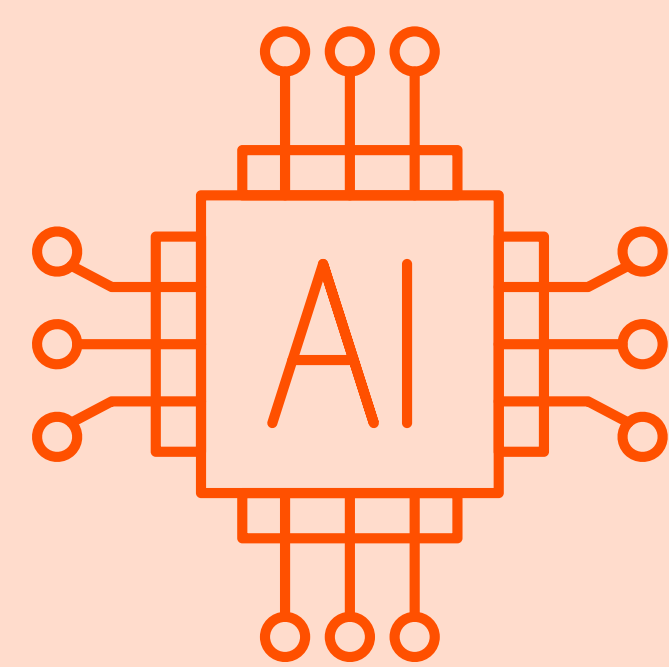
Achieve more with less effort

Embracing AI allows you to focus on growth and innovation, positioning your business for success in a competitive market. As you explore AI, remember it's a tool that can assist and empower, letting you and your team achieve more with less effort.

If you have questions about how AI can help your small businesses, please reach out.

Known for our do-it-all business software, Thryv has the tools you need to manage your day-to-day and grow your business — all in one place.

Sign up for an account and start growing your business today, for free with [Command Center](#).



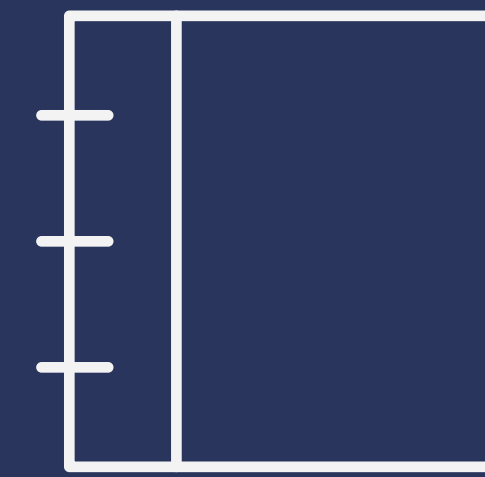
AI for All with Thryv

Thryv has the resources you need to keep up with trends, best practices, and more.



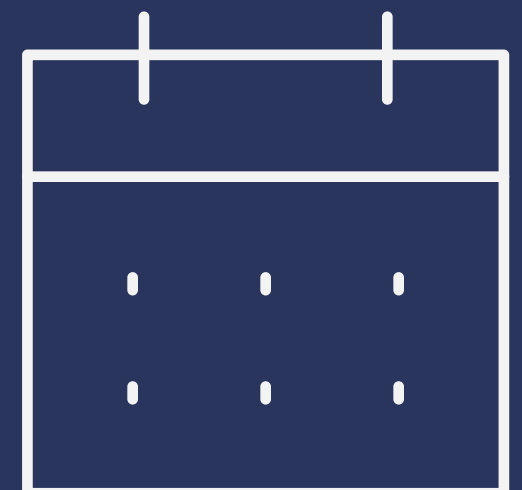
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