

AI for small operations teams: a one-page quick-start

Automate internal request intake first: one form, an agent that sets priority and team, and a confirmation email.

Where to start, in order

1. **Prompt Writing 101:** clear instructions are the whole job when you write triage rules.
2. **AI Maintenance & IT Request Form:** a form, a webhook and an agent that sorts every request.
3. **AI Vendor Follow-Up Agent:** drafts one chaser per late purchase order, with a reply-by date, into a sheet.
4. **Summarize a Meeting Transcript:** decisions and an action items table, with "Not stated" when an owner or date is missing.
5. **Daily Job Alerts:** a no-AI workflow that emails each person their rows every morning.

A prompt to copy: chase one late order

Role: You are the [YOUR ROLE] at [BUSINESS], writing to a vendor's sales rep or customer service team.

Context: We value this vendor but need an answer. The order: [ORDER DETAILS]. Use only these facts. Don't threaten to cancel, invent penalties, or mention other vendors.

Task: Write one follow-up that names the PO number and what was ordered, states the problem in one sentence, asks one clear question (a ship date, a tracking number or a fix), and asks for a reply by [REPLY BY].

Format: Under 80 words. Subject line with the PO number first, then the message, then my name. Polite, plain and firm. No "just checking in," no emoji.

From the free prompt library.

Remember: AI never approves spend, changes vendor terms or handles a safety issue alone. A person sends every vendor email.

What stays with a named person

Spend

AI compares quotes and drafts a request; a person approves the purchase.

Vendor terms

Prices, quantities, dates and cancellations are agreed by a person.

Safety

The form marks safety risks Urgent, but a person must see them right away.

The sort

Read the Requests sheet daily at first and fix any wrong priority or team.

Practice it free: Build an AI Maintenance and IT Request Form at learn.ynteractive.com/modules/lovable-n8n-operations. This sheet: learn.ynteractive.com/content/cheat-sheets/ai-quick-start-operations. Ridgeline Supply Co. is a made-up business from the lesson. By Robert Breen, October 1, 2026.