



07

FREE GUIDE

The small business AI tool stack

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INSIDE

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The plan

1. Look at the one-page table below and circle the three jobs that eat the most of your week.
2. Try the free pick for each of those three this week, one tool at a time, using the "try it" step in its section.
3. Keep what saved you time, delete the rest, and only pay when the free plan is the thing slowing you down (section 15 has the rule).

Try this now: the one-page stack

Twelve jobs, one pick each, and a second option if the first doesn't suit you. Every pick has a free plan or a free trial. Named tools were checked on the company's own website on the date at the top.

Job	Our pick	Other option
Writing and email	ChatGPT (free plan)	Claude (free plan)
Customer questions on your website	Tidio (free plan)	Crisp (free plan, chat only)
Answering the phone	Any AI receptionist with a free trial (section 5 says how to test one)	Call Donna at 778-504-7535 to hear one working
Meeting notes	Otter (free plan)	Google Meet "Take notes for me" (some Google Workspace plans; check yours)
Voice typing	The one built into your phone or computer (free)	Wispr Flow (free plan)
Images and design	Canva (free plan)	ChatGPT image creation (free plan)
Short video	Descript (free plan)	CapCut (free version)
Bookkeeping and receipts	Wave (free Starter plan)	Whatever your bookkeeper already uses
Spreadsheets and reports	ChatGPT file upload (free plan)	Gemini in Google Sheets (some Google Workspace plans; check yours)

Job	Our pick	Other option
Research	Perplexity (free plan)	Web search inside ChatGPT or Claude
A simple website	Any builder that passes the four checks in section 13	Another builder's free trial, to compare
Connecting your apps	Zapier (free plan)	Make (free plan)

Not sure which three to start with? Paste this into **chatgpt.com** or **claude.ai** with the table above:

COPY THIS

Here is a list of AI tools, one per job: [paste the table]. I run a [type of business] in [city] with [number] staff. The jobs that take most of my week are [list them, for example: answering the same customer questions, chasing invoices, writing quotes]. Pick the three rows that would save me the most time, in order, and for each one tell me the first small thing to try this week. Don't suggest any tools that aren't on the list. Keep it under 200 words.

Check that it picked jobs you actually do. If it suggests something you already handle well, ask it for the next one down.

1. Start here if you've never used AI

You don't need any experience to use this kit.

An AI tool is software that writes, listens or answers for you. Most of the ones in this kit use the same kind of technology as ChatGPT: you give it words (typed, spoken or in a file) and it gives words back. Some answer your phone, some write up a meeting, some make a poster from a sentence.

You don't need all twelve. Most small businesses get real use out of three or four.

Free really means free, within limits. A free plan usually caps how much you can do each month (minutes, messages, exports). Hitting that limit is the clearest sign a tool is worth paying for.

It makes mistakes. AI tools can mishear a name, invent a detail or misread a number, and they sound confident either way. Read what they produce before it goes to a customer.

Your data goes somewhere. Everything you type, upload or record goes to the company that runs the tool. Section 16 lists what to check before you connect anything.

Words you'll see

Word	What it means
Free plan	A version you can use for as long as you like, with limits. No card needed for most.
Free trial	Full access for a short time, then it stops or starts charging. Put the end date in your calendar.
Paid plan	The version you pay for each month or year, with higher limits.
Integration	A built-in link between two apps, so one can send information to the other.
Automation	A rule that runs by itself: "when this happens, do that".
AI agent	An AI that doesn't just write but takes an action, like answering a call or replying to a chat.
Transcript	A written copy of what was said in a call or meeting.
Export	Downloading your own data out of a tool, so you can take it elsewhere.
Lock-in	When leaving a tool is hard because your data or your customers are stuck in it.

2. How to judge any AI tool in five minutes

Before you sign up for anything, including the picks below, ask four questions.

- 1. What job does it do, in one sentence?** If you can't say "it answers my website chat" or "it writes up my meetings", you don't need it yet.
- 2. Can I try it for free with my real work?** Use it on one real email, one real meeting, one real receipt. If it doesn't help with those, stop there.
- 3. Where does my information go?** Look for a privacy page and a setting about whether your data is used to train or improve their AI. If the company won't say, don't paste customer details into it.
- 4. Can I leave?** Look for an export option. If your contacts, invoices or website can't be downloaded in a normal format, you'll be stuck paying whatever they charge next year.

To check a tool you've found yourself:

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I'm thinking about using [tool name] for [job] in my [type of business] in Canada. Look up the company's own website and tell me: what it actually does, whether it has a free plan or free trial, what the free plan leaves out, where it says customer data is stored, and whether I can export my data if I leave. Give me the links you used. If you can't find something, say so rather than guessing.

Open the links and check the answers yourself. Plans change.

3. Writing and email

Our pick: ChatGPT (free plan). Other option: **Claude (free plan).**

What it does: writes first drafts of emails, quotes, job ads, policies and social posts, and rewrites your rough notes into something clear. Both free plans can search the web, with lower limits than the paid plans.

Who it suits: almost every business.

Try it free this week: go to **chatgpt.com**, make a free account, and use it on the email you've been avoiding.

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Here's an email I need to answer: [paste, with the customer's name and details removed]. Here's what I want to say, in rough notes: [your notes]. Write a reply that's clear, friendly and under 120 words. Use plain Canadian English. Don't promise anything that isn't in my notes. If you need a fact I haven't given you, put it in [brackets].

What to check: every price, date and promise in the draft. It will sometimes fill a gap with something that sounds right. Keep customer names, addresses and health details out, and turn off the setting that lets your chats improve their models (in ChatGPT it's under Data controls in Settings; in Claude, look in the privacy settings).

Our guide to getting set up is at joe.droom.ca/chatgpt-and-claude, and 30 ready prompts are at joe.droom.ca/30-prompts.

4. Customer questions on your website

Our pick: Tidio (free plan). Other option: Crisp (free plan, chat only).

What it does: puts a chat box on your website. Tidio's AI agent, called Lyro, reads your support content (your FAQ and help pages, plus anything you add) and answers visitors' questions from it. When a question is outside what it knows, it passes it to a person. The free plan includes live chat, an inbox and a one-time allowance of Lyro AI conversations to try it out; more AI conversations need a paid plan.

Crisp's free plan gives two people a chat box and a shared inbox, with AI on paid plans. Pick it if you want to answer chats yourself first.

Who it suits: businesses whose website gets the same few questions over and over.

Try it free this week: before you install anything, write down the answers the chat should give. Use this prompt to turn your notes into a clean FAQ that Lyro (or any chat tool) can learn from:

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Here are the questions customers ask us most, with my rough answers: [paste]. Turn this into a website FAQ. One question per line, then a plain answer of one to three sentences. Keep my facts exactly as I wrote them. For anything I didn't answer, write "Please call us at [phone]" instead of guessing. Add a short note at the end saying what we don't do: [list].

Put the FAQ on your website, then connect the chat tool.

What to check: test it yourself with ten real questions, including awkward ones ("do you do emergency work at 2am?"). Make sure it hands over to a person rather than making something up. Tell visitors they're chatting with an automated assistant. And decide who gets the handover messages and how fast they'll be answered, or the chat box becomes one more place customers get ignored. If nobody will answer in the evenings, set the chat to say so and ask for an email.

5. Answering the phone

Our pick: any AI receptionist you can test on a free trial. We don't name products here. Droom runs one, so a list from us wouldn't be fair.

What it does: an AI receptionist picks up when you can't. A good one answers common questions and takes a message with the caller's name, number and what they need. It texts you a summary and hands an urgent call to a person. Most business phone services offer one on a free trial. Want to hear one before you sign up for anything? Call Donna at **778-504-7535**, any hour.

Who it suits: anyone who loses work to missed calls, like a trade on a roof or a clinic with a busy front desk.

Try it free this week: don't start with the tool. Start with the script it will follow. Paste this into ChatGPT or Claude:

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I run [business] in [city]. When someone calls and I can't answer, I want an AI receptionist to handle it. Here's what callers usually want: [list]. Here's what we do and don't do: [list]. Here are our hours and service area: [details]. Write the receptionist's instructions: a short greeting, the questions to ask every caller (name, phone number, what they need, how urgent), the answers it's allowed to give, and the things it must never do (quote prices, promise times, give medical or legal advice). Under 300 words.

Then start a free trial, put that script in, and call your own number from another phone. Check it works with Canadian numbers before you give it a card.

What to check: call it pretending to be a confused customer, an angry one and one with an emergency. Listen to whether it says it's an AI (it should), whether it gets your hours right and whether urgent calls reach you. If calls are recorded or transcribed, tell callers at the start; Canadian privacy law (PIPEDA, and BC's PIPA for many BC businesses) expects people to know how their information is used. Check with a professional if you handle health or legal information.

Our guide at joe.droom.ca/ai-receptionist lists the test calls to make before you trust any receptionist with real customers.

6. Meeting notes

Our pick: Otter (free plan). Other option: **Google Meet's "Take notes for me"** (on some Google Workspace plans; check yours).

What it does: listens to a meeting and gives you a written transcript and a summary. Otter's assistant can join your Zoom, Microsoft Teams and Google Meet calls automatically from your calendar. The free Basic plan has a monthly limit on minutes and a cap on how long each recording can be, which is plenty to find out whether it helps.

If your business already pays for Google Workspace, check whether your plan includes Gemini. Google says "Take notes for me" needs an eligible edition. If yours has it, Meet writes up the meeting without adding another app.

Who it suits: owners who lose track of who promised what on calls.

Try it free this week: record one internal meeting (not a customer call yet). Then paste the transcript into ChatGPT or Claude with this:

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Here is a meeting transcript: [paste]. Give me: every decision we made, every task with the person responsible and the date if one was said, and any question nobody answered. Use a short list for each. Don't add tasks that weren't said out loud.

What to check: transcripts go wrong on names and numbers, so check both. Always tell people the meeting is being recorded before it starts, and don't record a customer without their agreement. Delete recordings you don't need.

7. Voice typing

Our pick: the voice typing already on your phone or computer (free). Other option: **Wispr Flow (free plan).**

What it does: you talk and it types. On a phone, tap the microphone on the keyboard in any app. On Windows 11, press the **Windows key + H** in any text box. It may need an internet connection. Automatic punctuation is a setting you switch on in the voice typing settings. Macs and iPhones have dictation built in as well.

Wispr Flow is a dictation app for Mac, Windows, iPhone and Android that tidies up what you say as you go and learns names and trade words. Its free plan has limits, so check the pricing page before you rely on it.

Who it suits: anyone who writes job notes in a truck between sites.

Try it free this week: next time you finish a job or appointment, open a new chat in ChatGPT, tap the microphone and talk for one minute about what happened. Then send this:

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That was me talking through a job I just finished. Turn it into: a two-line note for the customer file, a short thank-you text to the customer (no name, I'll add it), and a list of anything I need to order or follow up on. Don't add details I didn't say.

What to check: voice typing mishears names, street names and numbers. Read those every time, and don't dictate private customer details in public.

8. Images and design

Our pick: Canva (free plan). Other option: ChatGPT image creation (free plan).

What it does: Canva gives you templates for posters, social posts, flyers and menus that you edit by dragging and typing, plus a monthly allowance of AI uses on the free plan (for example, generating a design idea from a sentence). The background remover is on the free plan. Some features, like resizing one design for every platform at once, need the paid plan. ChatGPT's free plan can also create images from a description, within a usage limit.

Who it suits: anyone making their own posts, signs or menus.

Try it free this week: let AI write the words, then make it look right in Canva. Paste this into ChatGPT or Claude first:

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I need a poster for [event or offer] at [business] in [city]. Details: [date, time, what's included, how to book]. Write: a headline under 8 words, one supporting line under 15 words, and the details as three short lines. Plain language, no exclamation marks, no made-up claims.

Then open Canva, search for a poster template, and paste in the words.

What to check: AI images can have garbled text, extra fingers and odd details, so zoom in before you print. Don't generate pictures of your own staff, van or premises that pretend to be real photos; use real photos for anything a customer would take as fact. Read each tool's terms if you plan to use AI images in paid ads.

9. Short video

Our pick: Descript (free plan). Other option: CapCut (free version).

What it does: Descript turns your video into a transcript and lets you edit the video by editing the text: delete a sentence and it's cut from the video. The free plan includes a monthly allowance of media minutes, captions and limited use of its AI tools. Free exports carry a watermark and are capped at a lower resolution. CapCut's free version covers cutting, trimming, text and basic audio editing. Automatic captions and most AI tools need the paid plan.

Who it suits: businesses that film short clips on a phone: a before and after, a quick tip, a product close-up.

Try it free this week: film a 60-second clip answering one question customers ask you. Before you film, use this prompt to plan it:

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I want to film a 60-second vertical video for [Instagram / Facebook / TikTok] answering this customer question: [question]. I run [business]. Write a simple script I can say to camera in my own words: a first line that states the question, three short points, and a last line telling people how to reach us. Under 130 words. Also give me three on-screen caption lines of under 6 words each.

What to check: captions get names and numbers wrong, so read them all. A watermark on a free export may be fine for a test but check it before posting as your business. Read the app's privacy terms before you upload footage that shows customers, their homes or their faces, and get their permission first.

10. Bookkeeping and receipts

Our pick: Wave (free Starter plan). Other option: **whatever your bookkeeper or accountant already uses.**

What it does: Wave is accounting and invoicing software that serves Canadian businesses. The free Starter plan lets you create unlimited estimates, invoices, bills and bookkeeping records. Scanning receipts, importing bank transactions automatically and sorting them into categories are paid features (the Pro plan or a receipts add-on).

If you have a bookkeeper, ask what they use. Being on their system saves more time than any AI feature.

Who it suits: sole owners and small teams who send their own invoices and currently keep receipts in a shoebox.

Try it free this week: set up one real invoice in Wave. For the shoebox, photograph a few receipts, upload them to ChatGPT (a few per message) and send this:

COPY THIS

These are photos of business receipts. For each one, list: date, supplier, total, GST/HST or PST if shown, and a category from this list: [materials, fuel, tools, meals, office, other]. Put it in a table I can copy into a spreadsheet. If you can't read something, write "unclear" instead of guessing.

What to check: every total and every tax amount against the paper receipt. A wrong tax figure is your problem at filing time, not the tool's. Keep the originals for as long as the CRA requires, and check with

your accountant before relying on any AI-sorted categories.

11. Spreadsheets and reports

Our pick: ChatGPT file upload (free plan). Other option: **Gemini in Google Sheets** (some Google Workspace plans; check yours).

What it does: you upload a spreadsheet (sales, bookings, jobs, stock) and ask questions in plain words: "which month was slowest?", "which service makes the most?". ChatGPT's free plan includes file uploads and data analysis, with lower limits than paid plans. On Google Workspace plans that include Gemini, it sits inside Sheets and can help you build or understand a sheet without leaving it.

Who it suits: owners who have their numbers in a spreadsheet or export but never look at them.

Try it free this week: export last year's sales or bookings from whatever system you use (look for "Export" or "Download CSV" in its reports section). Remove customer details first: delete the name, email and phone columns, then save a copy to upload. Then upload the file with this:

COPY THIS

This file is our [sales / bookings / jobs] for [period]. Tell me in plain language: our busiest and quietest months, our top five [services / products] by money, anything that changed a lot from one half of the year to the other, and one question I should look into. Show a simple chart for the monthly totals. If a column is unclear, ask me what it means instead of assuming.

What to check: ask it to show how it calculated one number, then check that number yourself in the spreadsheet. If one figure is wrong, the rest may be too. Never upload files with customer names, card numbers or health information.

12. Research

Our pick: Perplexity (free plan). Other option: **the web search inside ChatGPT or Claude.**

What it does: Perplexity answers questions by searching the web and showing the sources it used, so you can click through and check. The free plan covers everyday searches with a small daily number of its deeper "Pro" searches. ChatGPT and Claude can also search the web on their free plans.

Who it suits: owners comparing suppliers, checking a rule or looking into a competitor.

Try it free this week: pick one decision you've been putting off because you'd need to look into it.

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I run [business] in [city], BC. I'm deciding whether to [decision, for example: offer weekend appointments / switch fuel card / start selling gift cards]. Find: what I'd need to check with the city or province, what similar local businesses seem to do, and the main risks. Link every source. Prefer government and official sources for any rules. If sources disagree, say so.

What to check: open the sources. AI search sometimes summarizes a page wrongly or leans on an old article. For anything legal, tax or safety related, treat the answer as a list of questions to ask a professional, not the answer itself.

13. A simple website

Our pick: whichever builder passes the four checks below. We don't name one. Droom builds websites, so a list from us wouldn't be fair.

What it does: a builder lets you make a site by answering questions and dragging things around. Most now have AI that drafts a first version, and nearly all have a free plan or a free trial. The differences show up later, so check four things first:

1. **Your own domain.** On most free plans the site lives at the builder's address. Find out what connecting yourbusiness.ca takes before you build.
2. **Phone first.** Open the templates on your phone before you pick one. That's where most people will see your site.
3. **Your name, address and phone on every page,** matching your Google Business Profile exactly.
4. **A way out.** Ask whether you can download your pages and images. Moving between builders usually means rebuilding, so lock-in is real here.

Who it suits: new businesses with no website yet.

Try it free this week: the builder will ask you for words. Have them ready:

COPY THIS

Write the text for a one-page website for [business], a [type of business] in [city] serving [areas]. We do [services]. We don't do [things]. Customers usually contact us by [phone / form / booking link]. Write: a headline under 10 words that says what we do and where, a two-sentence introduction, a short paragraph for each service, and a contact section. Plain Canadian English. No claims about awards, years in business or reviews unless I give them to you.

What to check: everything the AI draft says about you. It will guess at your services, years in business and service area. Fix every guess before you publish.

14. Connecting your apps

Our pick: Zapier (free plan). Other option: **Make (free plan).**

What it does: these tools pass information between your other apps by themselves. For example: when someone fills in your website form, add them to a spreadsheet and send you a text. Zapier's free plan covers two-step automations (one trigger, one action) with a monthly limit on how many times they run, and it checks for new information every 15 minutes. Make's free plan has a monthly allowance, a visual builder, and lets you keep two automations switched on.

Who it suits: anyone who copies the same details from one app into another more than a few times a week.

Try it free this week: don't build first. Write down the chore, then ask for the plan:

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Every time [something happens, for example: a new booking comes in through my website form], I do this by hand: [the steps]. I use [list your apps]. Using Zapier's free plan, which only allows one trigger and one action, what's the simplest automation that removes the most typing? Tell me the trigger app, the action app, and what each field should be. If it needs more than one action, tell me which single step to automate first.

What to check: run it with a test entry and look at every field it filled in. Turn it off if you're not sure it's right; a wrong automation repeats its mistake every time. If an automation sends emails or texts to customers that promote your business, Canada's anti-spam law (CASL) applies: you need their consent, your business name and contact details, and a way to unsubscribe in every message.

Our step-by-step guide for your first one is at joe.droom.ca/first-automation.

15. Start with just three

For almost everyone, the first is ChatGPT or Claude. It helps with every other job here, including setting up the other tools.

The second is your biggest leak. If you miss calls, it's the phone. If the same questions arrive by chat and email, it's the website chat. If paperwork piles up, it's bookkeeping.

The third is your biggest chore. Meeting notes, voice typing and connecting your apps are the usual ones.

Give each tool two weeks of real use, then ask one question: did I use it without being reminded? If yes, keep it. If no, export anything you want and delete the account.

These are made-up businesses, not real customers.

- **A two-person plumbing company in Langley** picks ChatGPT for quotes and emails, a free trial of an AI receptionist because calls go unanswered while they're under a sink, and voice typing for job notes in the van.
- **A café in North Vancouver** picks ChatGPT for menus and posts, Canva for signs and specials boards, and Wave for invoicing their wholesale customers.

When to pay for a tool

Pay when **all three** of these are true:

1. You've used the free plan for at least two weeks and hit its limit more than once.
2. You can name the job it does and roughly how much time it saves you each week.
3. You've checked you can export your data if you stop paying.

Pay monthly for the first few months, so you can walk away. Once a year, cancel any paid tool you haven't opened in a month.

16. Privacy and lock-in: check before you connect

Go through this before any tool gets access to your email, calendar, phone line, books or customer list.

- ☐ I know what job this tool does, in one sentence
- ☐ I've found the company's privacy page and read what it does with my data
- ☐ I've switched off any setting that lets my data train or improve their AI, where there is one
- ☐ I only gave it access to what it needs (one calendar, not all of them; one inbox, not every account)
- ☐ Customers are told when an AI answers them, and when calls or meetings are recorded
- ☐ No health details, card numbers, SINS or passwords go into it
- ☐ Any promotional emails or texts it sends meet CASL: consent, our name and contact details, and an unsubscribe

- ☐ I know how to export my data and how to cancel
- ☐ The free trial end date is in my calendar
- ☐ One person on the team is responsible for this tool

A note on Canadian privacy law. Private businesses in most of Canada fall under PIPEDA, and many BC businesses fall under BC's Personal Information Protection Act (PIPA) instead. Both expect you to collect only what you need, tell people why, and protect it. Some tools store data outside Canada. That's generally allowed, but tell customers if it applies. If you handle health, legal or financial information, check with a professional before connecting any AI tool to it.

17. Quick reference

- The picks: ChatGPT, Tidio, an AI receptionist you've tested, Otter, built-in voice typing, Canva, Descript, Wave, ChatGPT file upload, Perplexity, a website builder that passes the four checks, Zapier. The table at the top has the second options.
- For the phone, write the script before you pick the tool.
- Start with three. Two weeks each. Pay only when you keep hitting the limit and can export your data.