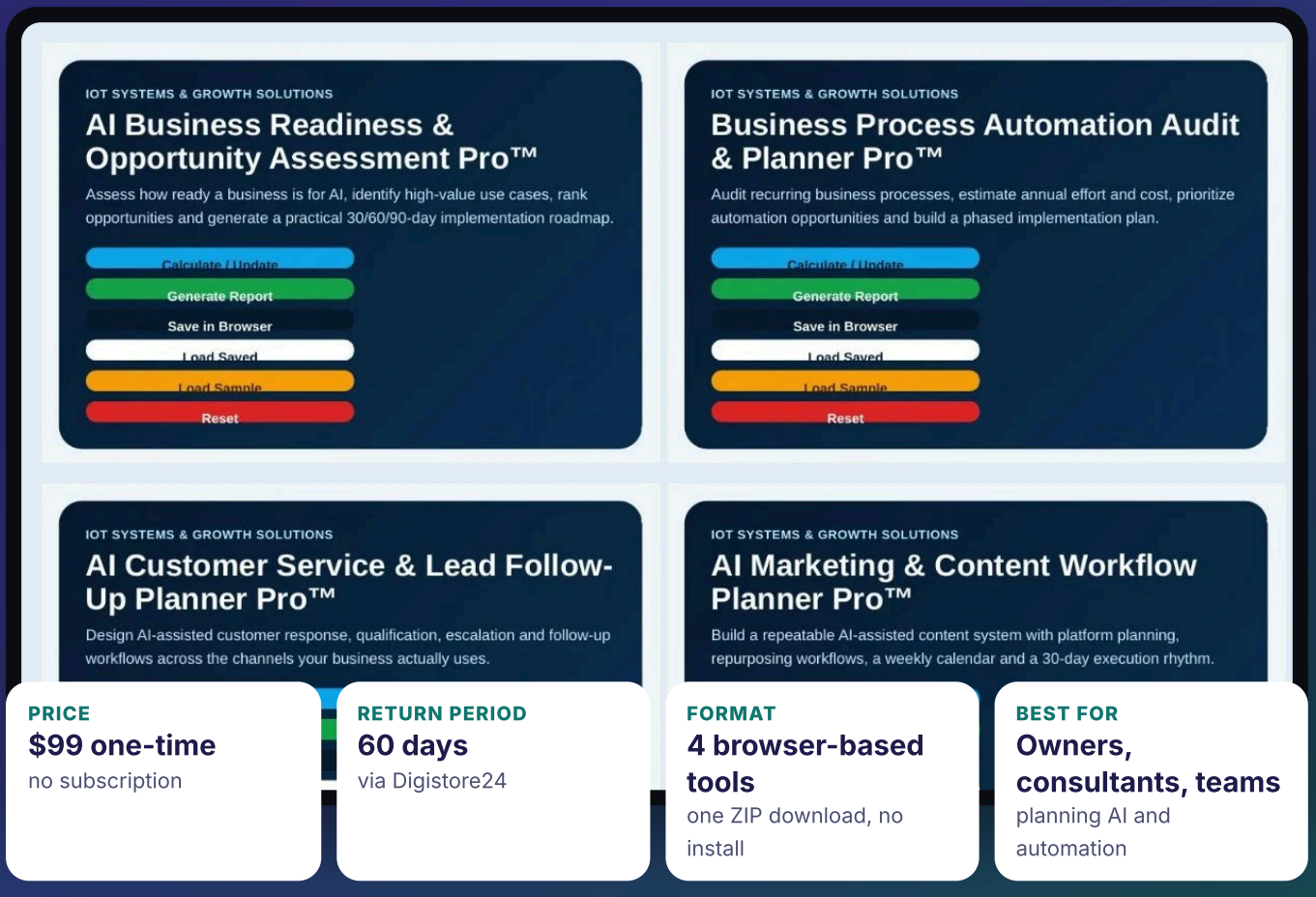
SoftwareSelects

Review & Setup Guide · November 26, 2026

Small Business AI & Automation Toolkit Review 2026: Plan Before You Automate

Four browser-based planning tools that help a small business find where AI and automation fit: an AI readiness assessment, a process automation audit, a customer follow-up planner and a content workflow planner — $99 one-time with a 60-day return period.



PRICE
$99 one-time
no subscription

RETURN PERIOD
60 days
via Digistore24

FORMAT
4 browser-based tools
one ZIP download, no install

BEST FOR
Owners, consultants, teams
planning AI and automation

By Serkan Fatih Gökdemir · SoftwareSelectssoftwareselects.com/business-productivity/small-business-ai-automation-toolkit/

OUR VERDICT

A sensible first step before spending money on AI

Top pick
AI planning

Most small businesses jump straight to buying AI tools. This toolkit does the step that should come first: it helps you work out where AI or automation would actually help. Its four browser tools take you through structured questions and scoring — how ready your business is, which repeat processes cost the most time and money, how customer replies and lead follow-up should work (and where a person must stay involved), and how a repeatable content workflow could look — and turn the answers into reports, roadmaps and CSV exports. We especially like the seller's honesty: it states plainly that the toolkit is not an AI agent, sends nothing and promises no savings. For a one-time $99 with a 60-day return period, it is a low-risk way to get clarity before you invest.

What we like

- **Clarity before cost.** Find and rank the opportunities before paying for AI tools or consultants.
- **Real numbers on your processes.** The automation audit estimates yearly hours and labour cost per task.
- **People stay in the loop.** The follow-up planner documents where AI may help and where a person must step in.
- **Reports you can use.** Generate reports, print or save as PDF, and export CSV in two of the tools.
- **Nothing to install.** Runs in a modern browser; work can be saved locally in the browser.
- **Honest and protected.** No income or savings promises, $99 once and a 60-day return period.

Good to know

- **A planning toolkit, not an AI agent.** It does not send messages, publish content or connect to AI models — you choose and set up any tools later.
- **Your input decides the output.** The scores and plans are only as good as the information you enter.
- **Browser save is local.** Saved work stays in that browser on that device; export reports to keep a copy.
- **Best for planners.** If you already know exactly which automation you want, you may not need it.

WHAT'S INSIDE

Four tools, one planning system

All four tools come in one ZIP download and share the same buttons: Calculate / Update, Generate Report, Save in Browser, Load Saved, Load Sample and Reset.

Assess

AI Business Readiness & Opportunity Assessment Pro
Readiness score, opportunity inventory, priority ranking

30/60/90-day roadmap
A practical order for what to try first

Business Process Automation Audit & Planner Pro
Process audit, annual labour estimate

Automation fit scoring
Rank which processes to review first

Plan

AI Customer Service & Lead Follow-Up Planner Pro
Channels, response targets, qualification

AI / human rules
Where AI may answer and when to escalate

AI Marketing & Content Workflow Planner Pro
Content pillars, platforms, repurposing

Weekly calendar & 30-day rhythm
A repeatable content routine

Save & share

Generate Report
A summary of your answers and plan

Print / Save as PDF
Share with your team or adviser

CSV export
In the audit and content planners

Load Sample
See a filled-in example first

Good to know: the seller states that the toolkit provides assessment, planning and documentation tools and does not guarantee cost savings, productivity gains, leads or revenue. You stay responsible for choosing and configuring any AI or automation services you use later.

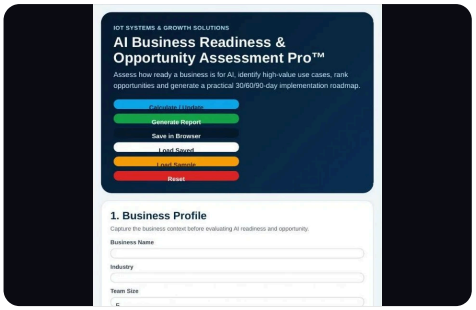
HOW IT WORKS

From “where do we start?” to a clear plan

1

Assess your AI readiness

Describe your business, team and systems, answer the readiness questions and list possible use cases. The tool scores readiness, ranks opportunities and builds a 30/60/90-day roadmap.



2

Audit your repeat processes

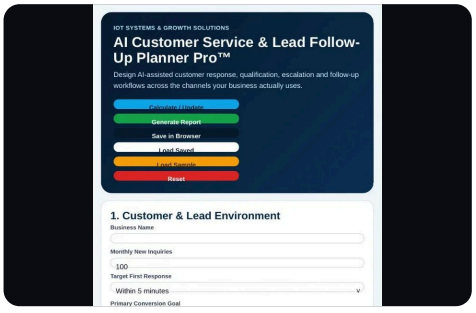
Enter your labour cost and each recurring process — frequency, minutes, people, errors. The planner estimates yearly effort and cost and ranks what is worth automating.



3

Plan customer replies and follow-up

Set your channels, monthly inquiries and response targets, then decide where AI may help, how leads are qualified, the follow-up cadence and when a person takes over.



4

Build a content workflow

Define your audience, offer and content pillars, choose platforms and get a repurposing workflow, a weekly calendar and a 30-day rhythm — then export or print it.



PRICING

One payment for all four tools

The complete bundle is a one-time purchase through Digistore24, delivered as one ZIP file right after payment. Price from the order form.

Everything included

Complete 4-tool bundle

$99 one-time

Browser-based tools in one downloadable ZIP file.

- AI Business Readiness & Opportunity Assessment Pro
- Business Process Automation Audit & Planner Pro
- AI Customer Service & Lead Follow-Up Planner Pro
- AI Marketing & Content Workflow Planner Pro
- 60-day return period via Digistore24

Taxes may be added at checkout where they apply. Download products can be downloaded up to 5 times within 3 months of payment, so keep a copy of the ZIP file.

HOW TO TRY IT

Try the toolkit risk-free in 4 steps

1
Buy the bundle
$99 once through Digistore24.

2
Open the tools
Extract the ZIP and open them in your browser.

3
Run your first plan
Readiness assessment and a process audit.

4
Decide within 60 days
Keep it, or request a refund through Digistore24.

Your safety net: the seller states that this Digistore24 purchase is covered by a 60-day return period. Refunds are handled by Digistore24 through the link in your order confirmation e-mail. The toolkit is a planning aid; it does not guarantee savings or results.

SETUP GUIDE

Setting up and using the toolkit

There is nothing to install. Plan about an hour for your first assessment and audit; the other two tools take 30–60 minutes each.

1 Buy and download the ZIP

Check out through Digistore24 ($99 one-time). You are taken straight to the download page; keep the order confirmation e-mail for the 60-day return period.

- Downloads work up to 5 times within 3 months — save the ZIP somewhere safe (cloud drive or USB stick).

2 Extract the files

Right-click the ZIP → **Extract All...** (Windows) or double-click it (Mac). Put the folder somewhere you will find it, for example “AI Toolkit”.

3 Open a tool in your browser

Double-click a tool’s file to open it in a modern browser such as Chrome, Edge, Firefox or Safari. Use the same browser every time, because saved work is stored in that browser.

💡 Bookmark each tool so you can open it again quickly.

4 Load the sample first

Click **Load Sample** to see a filled-in example, then **Calculate / Update** and **Generate Report** to see what you will get. Click **Reset** when you are ready to start with your own business.

5 Start with AI readiness

In the **AI Business Readiness & Opportunity Assessment Pro**, fill in your business profile, answer the readiness questions and list possible use cases. Click **Calculate / Update** for your score, ranking and 30/60/90-day roadmap.

6 Audit your top repeat tasks

In the **Business Process Automation Audit & Planner Pro**, set your average labour cost per hour and target automation %, then click **+ Add Process** for each recurring task: department, frequency, minutes, people and errors.

- Start with your five most repeated tasks — our savings estimator above shows the idea.
- Export the list as CSV to share or keep.

7 Plan follow-up and content

Use the **Customer Service & Lead Follow-Up Planner** for channels, response targets, AI/human rules and escalation, and the **Marketing & Content Workflow Planner** for pillars, platforms, a weekly calendar and a 30-day rhythm.

8 Save, report and act

Click **Save in Browser** as you go, then **Generate Report** and use **Print / Save as PDF** to keep and share your plan. Pick the first one or two opportunities and test them for 30 days.

- Clearing your browser data deletes browser-saved work — keep the PDF and CSV copies.
- If the toolkit is not for you, request your refund within the 60-day return period.

OPTIONAL

Which tool to start with

All four tools are in the bundle. Start with the one that matches your most pressing question.

"Where could AI help us?"

1. Open **AI Business Readiness & Opportunity Assessment Pro**.
2. Answer the readiness questions and list use cases.
3. Use the 30/60/90-day roadmap as your plan.

Best first tool for most businesses.

"We waste time on routine work"

1. Open **Business Process Automation Audit & Planner Pro**.
2. Add your repeat tasks with time and frequency.
3. Review the yearly cost and the priority ranking.

Gives you numbers for the decision.

"Leads slip through the cracks"

1. Open **AI Customer Service & Lead Follow-Up Planner Pro**.
2. Set response targets and qualification questions.
3. Decide when a person must take over.

Pair it with the content planner for marketing.

Six things worth knowing

Load Sample first
See a complete example before entering your own data.

Same browser
Saved work lives in the browser you used.

Export to keep
Save reports as PDF and lists as CSV.

Planning, not doing
It sends nothing and connects to no AI services.

Start small
Pilot one or two opportunities for 30 days.

People in the loop
Keep complaints and complex cases with a person.

PRINT & TICK

Your Small Business AI & Automation Toolkit setup checklist

Tick each step as you go. The first assessment takes about an hour.

- [ ] Buy and download the ZIP
- [ ] Extract the files
- [ ] Open a tool in your browser
- [ ] Load the sample first
- [ ] Start with AI readiness
- [ ] Audit your top repeat tasks
- [ ] Plan follow-up and content
- [ ] Save, report and act

Good to know: tool and button names come from the seller's preview images (November 2026). Our assistant can help you decide which tool to start with.

YOUR 60-DAY PLAN

Make the most of the return window

Week 1	Load the samples, then complete the AI readiness assessment.
Week 2	Audit your five most repeated tasks and export the list.
Weeks 3–6	Plan follow-up and content; pilot one opportunity.
Before day 60	Decide: keep it, or request your refund through the Digistore24 order e-mail.

FAQ

Quick answers

What is the Small Business AI & Automation Toolkit?

It is a bundle of four browser-based planning and assessment tools: an AI readiness assessment, a process automation audit, a customer service and lead follow-up planner and a marketing and content workflow planner.

Is it an AI agent or automation software?

No. According to the seller it does not send customer messages, publish content, connect to external AI models or deploy automations. It helps you evaluate, document and plan.

How is it delivered?

As one downloadable ZIP file right after purchase. You extract it and open the tools in a modern web browser — no installation needed.

How much does it cost?

$99 one-time for all four tools, plus tax where it applies. There is no subscription.

Is there a refund?

The seller states the purchase is covered by a 60-day return period, handled through Digistore24 and the link in your order confirmation e-mail.

Where is my work saved?

The tools can save your work locally in the browser. That copy stays on that browser and device, so generate a report, save it as PDF or export CSV to keep a backup.

SG

Serkan Fatih Gökdemir

Founder and Editor, SoftwareSelects

Serkan builds websites, WordPress plugins and online tools himself and checks every detail — what a product does, what it costs, the refund terms and who it suits.

Questions? Ask our assistant

Open softwareselects.com/business-productivity/small-business-ai-automation-toolkit/ and click “Ask about Small Business AI & Automation Toolkit” — it answers in seconds.

Sources: the seller’s sales page and the Digistore24 order form for the Small Business AI & Automation Toolkit, checked on November 26, 2026. Screenshots are the seller’s preview images of the tools. Details can change — always confirm the price and refund terms at checkout. SoftwareSelects may earn a commission from purchases made through our assistant’s links, at no extra cost to you. © SoftwareSelects