SMALL BUSINESS · 13 min read · September 3, 2026

The AI Side Hustle No One Is Doing

Every workflow in Claude for Small Business explained, how to actually reach a business owner, and the one-page pitch you leave behind once they're already interested.

Every small business owner is sitting on the same pile of work they hate. Chasing unpaid invoices. Closing the books at month end. Reading a contract before they sign it. Getting ready for taxes. None of them are going to fix this themselves, not because they can't, but because they don't have time to learn a new tool for one task a month. That gap is a real job, and almost nobody is doing it yet. This guide covers every workflow you're actually installing, how to reach a business owner without sounding like a cold pitch, and the one-page leave-behind that closes the deal once they're already interested.

> **YOU DON'T HAVE TO BE TECHNICAL**
>
> You don't need a coding background or an IT degree to do any of this. The plugin runs off plain instructions typed in normal English, the same way you'd text a person. If you want to see it in action before you touch it yourself, Claude Academy has a free walkthrough, Using Claude Cowork for your small business. It's free, it's short, and it's the fastest way to feel steady before your first real conversation. The only real requirement here is putting in the effort.

Claude for **Small Business**

WHERE THE PLUGIN LIVES

Open Claude, click **Cowork**, then **Customize**, then **Plugins**, and search "small business." Claude for Small Business is free to install. Install it on your own account first and run it yourself before you talk to anyone, you want to describe it from real use, not from a description you read.

PART 1 The Opportunity, Not the Software

Claude for Small Business is a free plugin with 15 pre-built workflows aimed at exactly the jobs small business owners put off: chasing unpaid invoices, closing the books at month end, reading a contract before they sign it, getting ready for taxes.

None of them are ever going to set it up themselves, and it isn’t about the money. It’s time. A plumber, a dry cleaner, the gym down the street, they’re already working full days running the actual business. Learning a new tool for a task they do once a month isn’t worth their time even when the tool is free. Most of them don’t know it exists yet.

That's the job. You install it, you run it, they get the result. You aren't selling AI. You're selling the fact that their invoices got chased this week and they didn't have to think about it.

PART 2 The Setup, Step by Step

Everything below happens once, on your own account, before you ever talk to a business owner.

1. Open Claude, click **Cowork**, then **Customize**, then **Plugins**.
2. Search "small business" and install **Claude for Small Business**. It's free.
3. Connect the tools it asks for, QuickBooks, PayPal, HubSpot, Canva, Docusign, Google Workspace, or Microsoft 365, whichever ones you already use. You don't need all of them to start.
4. Run one workflow with a real or realistic example. Watch what it actually produces, a drafted follow-up email, a summary, a checklist, whatever that workflow returns.
5. Do this for two or three workflows, not all fifteen. You need to describe it from experience, not read off a list.

PART 3 The 15 Workflows

Fifteen commands actually run things. Underneath them are the individual skills those commands call, some commands run more than one. Know what each one does and what it connects to, then pick the two or three that fit the business in front of you.

Skill	What it does	Tools it uses
MONEY AND FINANCE		

`/plan-payroll`	Builds a 30-day cash forecast, ranks overdue invoices, and drafts a reminder for each one. Runs `cash-flow-snapshot` `invoice-chase`	QuickBooks, PayPal
`/month-heads-up`	Reads the next 30 days of cash, finds your tightest week, and flags what to watch before month-end. Runs `cash-flow-snapshot`	QuickBooks
`/close-month`	Reconciles your books against your payment processor and writes the close packet for your accountant. Runs `month-end-prep`	QuickBooks, PayPal
`/price-check`	Builds a margin-by-product table and pricing scenarios with break-even math. Runs `margin-analyzer`	QuickBooks
`/tax-prep`	Calculates quarterly estimated taxes or builds a year-end 1099 list, formatted for your accountant. Runs `tax-season-organizer`	QuickBooks
`cash-flow-snapshot`	Reads cash, invoices, bills, and incoming settlements and builds a 30/60/90-day forecast with the tight weeks flagged.	QuickBooks, PayPal
`invoice-chase`	Ranks overdue invoices and drafts a reminder for each one, matched to how that customer has paid before.	QuickBooks, PayPal
`margin-analyzer`	Builds a margin-by-product table and pricing scenarios with break-even math.	QuickBooks, PayPal

	Shows the numbers, you decide what to charge.	
`month-end-prep`	Reconciles your books against your payment processor, flags what's off, writes the close packet for your accountant.	QuickBooks, PayPal
`tax-season-organizer`	Calculates quarterly estimated taxes or builds a year-end 1099 list, formatted for your accountant.	QuickBooks, PayPal
SALES AND MARKETING		
`/call-list`	Scores your leads on engagement, fit, and urgency, and writes a call card for the top ones. Runs `lead-triage`	HubSpot
`/sales-brief`	Ranks top and bottom sellers and drafts a content plan that pushes the winners. Runs `content-strategy`	QuickBooks or PayPal
`/run-campaign`	Reads your sales history, finds the slow stretch, drafts the offer, builds the assets, and stages the send. Runs `content-strategy` `canva-creator` `lead-triage`	HubSpot, Canva
`lead-triage`	Scores your leads on engagement, fit, and urgency, and writes a call card for the top ones with talking points.	HubSpot

`content-strategy`	Reads your sales data, finds what's selling and what isn't, and drafts a content plan that pushes the winners.	QuickBooks or PayPal
`canva-creator`	Builds the campaign from a brief: posting calendar, social designs, captions, and a staged email.	Canva, HubSpot
CUSTOMERS AND OPERATIONS		
`/handle-complaint`	Reads a customer email, looks up their order and history, and drafts a reply matched to the situation. Runs `ticket-deflector` `customer-pulse`	Gmail, HubSpot
`/customer-pulse-check`	Reads disputes, tickets, emails, and reviews and groups them into themes with a draft response for each. Runs `customer-pulse` `ticket-deflector`	PayPal or HubSpot
`/crm-cleanup`	Finds stale deals, duplicate contacts, and missing fields. Shows what it found before changing anything. Runs `crm-maintenance`	HubSpot
`/review-contract`	Reads a contract and writes a plain-English summary, a red-flag list, and a marked-up redline. Runs `contract-review`	Uploaded file
`ticket-deflector`	Reads a customer email, looks up their order and history, and drafts a reply matched to the situation.	PayPal, HubSpot, Gmail

`customer-pulse`	Reads disputes, tickets, emails, and reviews and groups them into themes with the most fixable problems first.	PayPal or HubSpot
`crm-maintenance`	Finds stale deals, duplicate contacts, and missing fields. Shows what it found before changing anything.	HubSpot
`contract-review`	Reads a contract and writes a plain-English summary, a red-flag list, and a marked-up redline.	Uploaded file, Docusign optional
BUSINESS INTELLIGENCE		
`/monday-brief`	One page to start the week: cash, sales trend, pipeline, this week's calendar, and what most needs you today. Runs `business-pulse`	Whatever's connected
`/friday-brief`	Revenue against last week, what sold, wins and watches. Runs `business-pulse`	PayPal or HubSpot
`/quarterly-review`	Revenue and margin trends, customer health, opportunities, and risks, written as a narrative. Runs `business-pulse`	QuickBooks
`business-pulse`	One page: cash, sales trend, pipeline, this week's calendar, and the things that most need your attention.	Whatever's connected
HIRING AND SETUP		
`job-post-builder`	Writes a job post, a structured interview guide with a scoring rubric, and an offer	No connector required

	letter template.	
`smb-onboard`	The setup skill. Asks about the business, helps connect the tools, and saves that context so every other skill already knows it.	No connector required

Every one of these drafts and waits. Nothing sends, posts, or pays until the business owner approves it. You aren't handing over control, you're handing them a draft they still say yes to.

PART 4 How to Reach a Business Owner

Start with people, not businesses. Think about who's already in your life, your friends, the people you hang out with, people from the gym. Somebody in your circle owns a small business or knows someone who does, and that beats a stranger every time.

Something this simple works: "Hey, I'm starting this AI side business, and I'd love to do a couple of automations for you for free, of course. If it works out for you, maybe you'll refer me to someone else." No pitch, no sales voice, just a friend offering to help.

Once they say yes to that:

- **Name one specific thing you noticed, not a general offer.** "I know you're always chasing people down for payment, I can fix that" lands better than "I help businesses with AI."
- **Offer to show, not tell.** Run it on one of their actual invoices or actual contracts this week, free, so they see the result instead of hearing about the technology.

Do this with a couple of people in your circle first. Once you've got a few real results and a couple of them will vouch for you, that's when you're ready to approach business owners you don't already know. A testimonial from someone real does more work than any pitch you could write.

The one-page pitch further down comes after this, once they've already said yes to trying it, not before.

PART 5 The One-Page Pitch

This comes out once someone's already said yes to trying it, never before. Copy it, drop in your own numbers where you see the blanks, that part's up to you.

PROMPT

```
[Your Business Name]

Your Admin, Handled. Nothing Changes On Your End.

You didn't start [their business] to spend your nights chasing invoices,
closing the books, or reading contracts you don't have time for. I set up
a system that does that work for you and hands you the result. No new
software to learn, no login to remember, you keep running your business
exactly the way you already do.

What gets handled:
- Unpaid invoices get chased automatically, so you get paid faster
  without the awkward follow-up calls
- Your books get closed and summarized every month, so tax season
  stops being a scramble
- Contracts get reviewed before you sign, so you catch the fine print
  you don't have time to read
- [add one more task specific to their business]

Try it free first.
I'll run one of these for you this week, on the house, so you can see
the result before you spend a dollar. If it's useful, we talk about
keeping it running.

Setup: $___
Monthly: $___ to keep it running and answer questions

[Your name] · [phone or email]
```

How to actually price it: price against the time you're saving them, not against what the plugin costs you, it's free to you. If chasing invoices and closing the books eats three or four hours of their week, that's real money to a business owner even at their own hourly rate. The setup fee covers your install and first workflow runs. The monthly fee covers you staying on call to run it, fix anything that breaks, and answer questions. Start a little lower with your first client since you're also building your own case study, then raise the rate once you have a real result to point to.

PART 6 Closing the First One

The free run is the whole pitch. Once they see their own invoice get chased or their own contract get flagged, the setup fee and monthly rate are an easy yes, because they already saw the result instead of hearing a promise about it.

Once they say yes, that's when you send the one-page pitch as a reference sheet, not before.

IS THIS A GOOD FIT

Not every business is worth pitching first. Look for real repetitive admin work, not a one-person shop with almost no paperwork, an owner who's already complained about the busywork out loud, and no one on staff already handling it. If all three are true, that's your first call.

WHAT THIS ISN'T

This is real work, not passive income. It takes an actual conversation with an actual business owner, and some will say no. Five clients on a retainer is a real second income, but it takes five real conversations to get there.

DO THIS TODAY

Install the plugin, run one workflow on a real example so you can describe it from experience, then name one business you already know that fits the checklist above and go say the one sentence that names their actual problem.

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