

— A FREE STRATEGY GUIDE FOR AUSTRALIAN SMBS

# The 2026 AI Automation *Playbook*

## for Australian Businesses.

— INSIDE

16 pages · 5 case studies  
1 ROI worksheet · 1 scorecard

— READ TIME

8 minutes  
cover to cover

## — FROM THE TEAM

# If you've been watching AI from the sidelines — *this is for you.*

Every Australian business owner we talk to says the same thing: "I know AI is a thing, I just don't know where to start." The headlines are loud. The advice online is contradictory. And the price tags from agencies are eye-watering.

This playbook cuts the noise. It's the same framework we walk new clients through on a discovery call — written down, with real Australian numbers, real case studies, and a worksheet you can fill out in 20 minutes.

No fluff. No buzzwords. Just what we'd tell you if you booked a call with us tomorrow.



**Source Digital Team**  
Perth · Servicing all of Australia

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**Best read with a notebook open**

Pages 8 and 15 are designed to be filled in. Print them or annotate digitally — your scorecard will be the basis of our first call.

## — CHAPTER 01

# What AI automation actually *is* — and what it isn't.

Everyone's selling "AI" right now. Most of it is repackaged software with a chatbot stapled on. Here's the line we draw on a discovery call.

## ✓ WHAT IT IS

**A 24/7 customer service agent**

Trained on your products, policies and tone — answering 80%+ of inbound enquiries without a human.

**A quoting and estimating engine**

Reads plans, specs or photos; produces a costed quote in minutes, not days.

**Document intelligence**

Reads invoices, contracts, applications — extracts what matters, files it, flags exceptions.

**A knowledge base that talks back**

Your SOPs, manuals and policies — searchable in plain English by staff and customers.

## ✗ WHAT IT ISN'T

**A chatbot bolted to your website**

Generic ChatGPT wrappers without your data are useless and embarrassing.

**A magic replacement for your team**

Done well, AI gives your team back hours. Done badly, it breaks things quietly.

**A six-figure 18-month project**

Most useful systems ship in 4–8 weeks for \$5K–\$15K. If you're being quoted more, ask why.

**"AI"-washed automation**

A Zapier flow with an AI step in it isn't an AI system. Be careful what you're paying for.

— THE OPPORTUNITY

# By the numbers, this is the largest productivity shift since the spreadsheet.

• TIME SAVED

**15-30**

hours per week reclaimed by businesses using well-scoped AI automation.

• RETURN

**300-**

**500%**

Average ROI in the first 12 months across deployed customer-service & operations bots.

• NATIONAL WASTE

**\$47 B**

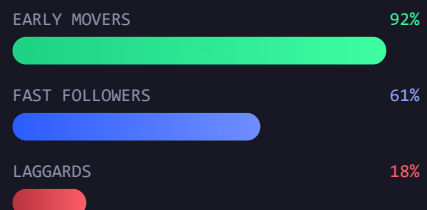
Wasted annually by Australian businesses on tasks that AI can confidently handle today.

— READ THIS TWICE

## The businesses moving now will set their cost base for the next decade.

The window where AI is a competitive edge — rather than table stakes — is narrowing. The Australian businesses that built websites in 2002 outsold the ones that built them in 2010. The same gap is opening on AI right now, and it will close inside three years.

— CAPABILITY GAP (ILLUSTRATIVE)



FIGURES SOURCED FROM CLIENT DEPLOYMENTS, PUBLISHED INDUSTRY BENCHMARKS & ABS PRODUCTIVITY DATA, 2024-2026.

## — CHAPTER 02

# 7 tasks every business can automate *today*.

These aren't aspirational. Every single one is something we've shipped to a paying Australian client in the last 18 months. If 3+ of these resonate, you have a real automation case.

01

**After-hours customer enquiries**

Answer 80%+ of 'what are your hours / do you do X / how much' instantly.

🕒 SAVES 6-12 HRS/WK

02

**Quoting from photos or specs**

Estimate jobs in minutes from photos, plans or a voice note.

🕒 SAVES 4-8 HRS/WK

03

**Invoice & receipt processing**

Read, code, and file every supplier invoice straight to your accounting stack.

🕒 SAVES 3-6 HRS/WK

04

**Appointment booking & reminders**

Two-way calendar AI that books, reschedules, confirms — by SMS or web.

🕒 SAVES 5-10 HRS/WK

05

**Lead qualification & routing**

Score and route every form fill, missed call and email to the right person.

🕒 SAVES 4-7 HRS/WK

06

**Internal knowledge search**

'How do we handle X?' — answered from your SOPs in under 3 seconds.

🕒 SAVES 2-5 HRS/WK

07

**Reporting & weekly summaries**

Auto-generated KPI roll-ups, sales summaries and board packs every Friday.

🕒 SAVES 2-4 HRS/WK

**Something else?**

If your repeatable task isn't here, we probably still ship it. Bring it to a discovery call.

— CHAPTER 03 • COST COMPARISON

# AI vs hiring — what it *actually* costs in Australia.

Most cost comparisons quietly omit super, leave loading, workers' comp and onboarding. Here's the honest one — for a mid-tier admin / customer-service hire in 2026.

LINE ITEM	FULL-TIME HIRE	AI AUTOMATION
Base salary (mid-tier admin / CS)	\$65,000	—
Superannuation @ 11.5%	\$7,475	—
Annual + sick leave loading (≈8.5%)	\$5,525	—
Workers' comp + payroll tax (≈4%)	\$2,600	—
Software, hardware, desk, onboarding	\$4,200	—
Recruitment fee (amortised)	\$3,500	—
<b>Build / setup (one-off)</b>	—	\$5,000–\$15,000
<b>Hosting + AI usage / month</b>	—	\$200–\$600
Maintenance & supervision	Manager time	\$300–\$800/mo
<b>Year 1 total — typical scope</b>	<b>\$85,000–\$95,000</b>	<b>\$11,000–\$25,000</b>
<b>Year 2 onwards (annualised)</b>	<b>\$80,000+</b>	<b>\$6,000–\$12,000</b>

— CAVEAT 1

AI handles tasks; humans handle judgement. The right move is almost always **1 great hire + AI**, not "fire the team."

— CAVEAT 2

"AI automation" prices above assume **a single, well-scoped use case** — not a whole-company rollout.

— CAVEAT 3

Numbers reflect 2026 Award rates and our delivered project averages — your specific quote will vary.

— CHAPTER 03 • COST OVER TIME

# A 3-year view — same outcome, *different bills.*



• 3-YEAR SAVING

**\$214K**

Cumulative cost difference, mid-range scenario.

• PAYBACK PERIOD

**3.4 mo**

Median time to break-even on the build cost across our 2024-25 deployments.

• CAPACITY UNLOCKED

**1,040 hrs**

Per year. The equivalent of half an FTE — given back to the team for high-value work.



— 20-MINUTE EXERCISE

# Your AI ROI worksheet.

Answer each line below honestly — round numbers are fine. Bring this to your strategy call and we'll size a build that actually clears your bar.

## — A · THE COST OF DOING NOTHING

Hours/week your team spends on the task

Include phone calls, email, copy-paste, looking-up

hrs

Average loaded hourly cost of that team

Salary + super + overhead + 1,920 hrs

\$/hr

Number of weeks per year worked

Usually 48

wks

Estimated lost revenue from delays

Missed leads, late quotes, slow replies

\$

A · Annual cost of status quo

\$

## — B · THE COST OF AUTOMATING

One-off build (year 1 only)

Typical: \$5K-\$15K

\$

Monthly hosting + AI usage × 12

Typical: \$200-\$600/mo

\$

Monthly maintenance × 12

Optional: \$300-\$800/mo

\$

Internal time supervising it

≈2 hrs/wk × loaded rate × 48

\$

B · Year 1 cost of automation

\$

— YEAR 1 SAVING

**A - B =**

**\$ \_\_\_\_\_**

— ROI MULTIPLE

**(A - B) ÷ B**

— PAYBACK

**B ÷ (A ÷ 12)**

**mo**

— CHAPTER 04 · REAL AUSTRALIAN DEPLOYMENTS

# 5 case studies. 5 industries. *One framework.*

Names anonymised. Numbers are real, drawn from 6-month post-launch reviews. We've selected five businesses that look like ours collectively — none over \$20M revenue, all founder-led.



ELECTRICAL TRADE

PERTH, WA

## Voice AI that turns missed calls into booked jobs.

### — THE PROBLEM

A 6-sparkie business missing 30+ calls/week while on the tools — losing roughly \$14K/month in unbooked work to faster competitors.

### — WHAT WE BUILT

Voice AI receptionist on the main line: triages emergencies, books standard jobs straight into ServiceM8, SMS-confirms with the customer, alerts the on-call sparkie.

**94%**

Of incoming calls now booked or qualified

**+\$11K**

Net new revenue / month, month 2 onwards

**6 wks**

Build to live



PROPERTY MGMT

BRISBANE, QLD

## Tenant-enquiry bot that handles 70% of after-hours requests.

### — THE PROBLEM

An agency managing 480 doors drowning in repeat tenant queries — bond, bins, breakages — across 4 PMs working evenings & weekends.

### — WHAT WE BUILT

Tenant chat bot trained on each property's lease, manuals and emergency policy. Routes the rest to the on-call PM with the right context attached.

**71%**

Of after-hours queries fully self-served

**-18 hrs**

PM hours / week reclaimed

**4.7★**

Avg tenant satisfaction post-launch

— CHAPTER 04 (CONT.)

# More wins from the field.



PLUMBING

ADELAIDE, SA

## Photo-to-quote AI that cuts quoting time by 8x.

— THE PROBLEM

A 12-person plumbing crew taking 35–60 minutes to write each quote. Conversion suffering because quotes were going out 2–3 days late.

— WHAT WE BUILT

Photo + voice-note quoting tool: tradie snaps photos and dictates context on-site; AI drafts a costed quote against the company's price book; estimator approves & sends in one click.

**4 min**

Median quote turnaround (was 45)

**+38%**

Conversion rate vs 2024 baseline

**\$5K**

All-in build cost



ACCOUNTING

MELBOURNE, VIC

## A document AI that BAS-codes 800 invoices/week.

— THE PROBLEM

A boutique CA firm with a \$42K/yr offshore data-entry team, 24-hr turnaround on simple bookkeeping, and chronic month-end backlog.

— WHAT WE BUILT

Document intelligence pipeline: invoices in via email → extracted, BAS-coded, posted to Xero with line-item detail → exception queue surfaces only the 5% that need a human eye.

**95%**

Invoices fully automated, no human

**\$36K**

Annual cost saving year 1

**3.5 mo**

Payback on \$11K build

— PATTERN ACROSS ALL FIVE

Every build solves **one** bottleneck — not the whole business.

START NARROW. SHIP. COMPOUND.

— FINAL CASE · 2024-2025

# A \$4.2M e-commerce brand that *shrank* CS without shrinking service.

E-COMMERCE

SYDNEY, NSW

SHOPIFY · 30K SKU

## Customer service AI handling tracking, returns & sizing — handing off only when it should.

### — THE PROBLEM

Three full-time CS reps drowning in "where's my order?" tickets every Monday. Average first-response time stretched to 14 hours; refund rate climbing because customers couldn't get answers in time.

### — WHAT WE BUILT

A Shopify-integrated CS agent that pulls live tracking, processes simple returns, looks up sizing from product data, and detects "I'm angry" cues to route to a human with the full context attached. We kept all 3 reps — they now handle the hard 18% beautifully.

### — OUTCOME AT 6 MONTHS

First-response time dropped from **14 hours to 11 seconds**. CSAT held at 4.6★. The team reinvested ~80 hrs/week into proactive outreach that *added* \$260K in revenue over Q4.

#### • TICKETS AUTOMATED

**82%**

Of all inbound tickets fully resolved without a human.

#### • RESPONSE TIME

**14h → 11s**

Median first-response across all channels.

#### • REVENUE LIFT

**+\$260<sub>K</sub>**

From freed-up CS hours redirected to proactive outreach in Q4.

— CHAPTER 05 · BUILD IT WELL, NOT BIG

# The 2026 recommended tech stack.

Six layers, in plain English. You won't need all of them on day one — but you'll touch all of them inside the first year. Pick boring, proven tools at every layer.

**L1 Models & reasoning**

GPT-4 class, Claude 3.5, Gemini 1.5 — selected per task. Prefer Australian-region inference where available.

OpenAI

Anthropic

Google Vertex

**L2 Knowledge & memory**

Vector store + structured DB. Your SOPs, manuals and product data — versioned and access-controlled.

Pinecone

Supabase pgvector

Postgres

**L3 Orchestration**

The plumbing that sequences calls, retries failures and hands off to humans. Avoid black-box 'no-code AI' here.

Custom (TypeScript)

Temporal

n8n (light cases)

**L4 Integrations**

Where AI meets your existing systems — accounting, CRM, calendars, telephony, e-commerce.

Xero / MYOB

HubSpot

ServiceM8

Shopify

**L5 Guardrails & monitoring**

Logging, eval, content filters, PII redaction. Non-negotiable — this is what separates production AI from a toy.

Langfuse

Custom evals

Sentry

**L6 Human interface**

Where your team and customers interact. Built lean — no over-engineered dashboards.

Web (Next.js)

Slack

SMS / WhatsApp

**Heuristic:** if a vendor can't show you a system prompt, an eval suite and a fail-over plan — it's not a production AI system. It's a demo.

## — CHAPTER 06

# Getting started — a *4-step* process, roughly 6 weeks.

## 01

WEEK 0

### 🔍 Discovery

30-minute call. We map the bottleneck, the data and the budget. No deck, no upsell — half our calls end with “hold off until you have X.”

— YOU WALK AWAY WITH

Written summary + go/no-go

## 02

WEEK 1

### 🎯 Scope

Fixed-price proposal with deliverables, success metrics and timeline. One use case, ruthlessly scoped. We refuse projects that try to boil the ocean.

— YOU WALK AWAY WITH

Statement of Work + commercial

## 03

WEEKS 2-6

### ⚙️ Build

Weekly demos in staging on real data. You see it working — and breaking — before we touch production. You can pull the plug at any milestone.

— YOU WALK AWAY WITH

Working system in staging

## 04

WEEK 7+

### 🚀 Deploy

We ship into your stack, hand over docs, and stay on retainer if you want it. The first 30 days post-launch we sit on calls with your team.

— YOU WALK AWAY WITH

Live system + 30-day support

The discovery call is genuinely free. You won't be sold to. About 30% of our discovery calls end with us telling the client they don't need us yet.

BOOK ONE → P. 16

## CHAPTER 07 · AVOIDABLE MISTAKES

# 6 mistakes that kill AI projects — *before they ship.*

We've been called in to rescue 14 stalled AI projects in the last two years. Almost every one died for one of these reasons. Read this twice before you sign with anyone — including us.

01

**Trying to automate everything at once**

The fastest way to fail. Pick one bottleneck, ship it, then compound. 'AI strategy' projects rarely make it to production.

02

**Skipping the data audit**

AI is only as good as what it can read. If your SOPs live in 12 inboxes and one Word doc, fix that first — or budget for it in the build.

03

**Buying 'AI agencies' without engineers**

Half the agencies pitching AI today are marketers in Zapier. If their senior team can't write the system prompt themselves, walk.

04

**Replacing humans by accident**

Tell your team upfront how AI will change their day. Done well, AI takes the worst part of every job. Done quietly, it breeds resentment.

05

**No evals, no logging, no plan B**

You wouldn't run a payment system without monitoring. Don't run an AI system without it either. This is non-negotiable.

06

**Optimising for the demo, not the boring 80%**

Impressive demos are easy. The hard work is the 20% of cases that misbehave. Demand to see the failure modes before you sign.



— 10-QUESTION READINESS CHECK

# Are you ready for AI?

Tick each box honestly. Score below to see whether to book the call now, or fix something first.

01	Our team spends 10+ hours/week on a repetitive, rule-based task.	<input type="checkbox"/>
02	We have at least one process that's documented well enough that someone new could follow it.	<input type="checkbox"/>
03	We have leadership buy-in — including a sponsor who can sign off on \$10K–\$15K.	<input type="checkbox"/>
04	We have a single, named bottleneck (not a vague “use AI somewhere” wish).	<input type="checkbox"/>
05	We can measure the cost of the status quo (hours, dollars, missed revenue).	<input type="checkbox"/>
06	Our customer or operational data lives in systems with APIs (not just paper).	<input type="checkbox"/>
07	We're prepared to keep humans in the loop for the first 90 days post-launch.	<input type="checkbox"/>
08	We're willing to redesign the process — not just “bolt AI on top.”	<input type="checkbox"/>
09	We have a clear answer to “what do we do with the time we save?”	<input type="checkbox"/>
10	We can commit to weekly 30-minute demo reviews for 4–6 weeks.	<input type="checkbox"/>

**0–4** NOT YET

Book a call anyway — we'll help you build the foundation. AI will be cheaper in 6 months than it is today.

**5–7** CLOSE

You're 1–2 things away from a great first build. Book a call and we'll help you sequence them.

**8–10** READY

You're set up to ship. Book the call this week — we typically have a 2–3 week scoping queue.

## — YOUR MOVE

# Book your free *strategy call.*

Bring the worksheet on page 8 and the scorecard on page 15. We'll spend 30 minutes mapping your highest-ROI build — and tell you honestly whether to start now, or wait. **No pitch deck. No upsell.**

[Book your free strategy call →](#)[source-digital.com.au ↗](https://source-digital.com.au)

CALL US

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u

We reply within 1 business day



ONLINE

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Perth · Servicing all of Australia

**Source Digital**

AI consulting and custom software for Australian businesses. Perth-based, working across Australia.

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