

AI FOR SMALL BUSINESS OWNERS

Your Practical Resource Guide

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GETTING STARTED

Recommended Tools

Tool	Best For	Cost	Website
ChatGPT	All-around, images, voice	Free / \$20/mo	chat.openai.com
Claude	Long docs, nuanced writing	Free / \$20/mo	claude.ai
Gemini	Google Workspace users	Free / \$20/mo	gemini.google.com
Copilot	Microsoft 365 users	Included w/ M365	copilot.microsoft.com

Recommendation: Start with the free tier of ChatGPT or Claude. Use it for one week on one task. Then decide if the \$20/month upgrade is worth it.

The Prompting Framework: R-T-C-F

R	Role	Who should the AI be? (marketing expert, HR manager, etc.)
T	Task	What specifically do you want done?
C	Context	Business details, audience, situation
F	Format	Word count, tone, structure

CUSTOMER COMMUNICATIONS

Customer Inquiry Response

Role: Act as a friendly, professional customer service representative for a small business. **Task:** Write a response to a customer inquiry. **Context:** • My business: [BUSINESS NAME AND WHAT YOU DO] • Customer's question: [PASTE THEIR MESSAGE] • Key info they need: [ANSWER TO THEIR QUESTION] • Any limitations/policies: [RELEVANT POLICIES] **Format:** Warm and helpful. Under 150 words. Answer their question directly, then offer additional help.

Responding to a Complaint

Role: Act as a business owner who takes customer concerns seriously. **Task:** Write a response to a customer complaint. **Context:** • Their complaint: [SUMMARY OF ISSUE] • What went wrong: [YOUR UNDERSTANDING] • What I can offer: [REFUND / REPLACEMENT / DISCOUNT / APOLOGY] • Resolution timeline: [WHEN THEY CAN EXPECT FIX] **Format:** Empathetic and solution-focused. Acknowledge their frustration, take responsibility, offer clear next steps. 100-150 words.

Follow-Up After Purchase/Service

Role: Act as a small business owner building customer relationships. **Task:** Write a follow-up email after a customer purchase or service. **Context:** • Customer name: [NAME] • What they purchased/service received: [DETAILS] • Date of purchase: [DATE] • Anything to remind them about: [CARE INSTRUCTIONS / WARRANTY / NEXT APPOINTMENT] **Format:** Brief and genuine. Thank them, check if they're satisfied, invite them to reach out with questions. Include soft ask for review if appropriate. Under 100 words.

MARKETING & SOCIAL MEDIA

Social Media Content Calendar

Role: Act as a social media manager for a small business. **Task:** Create a week of social media posts. **Context:** • My business: [WHAT YOU DO] • Target audience: [WHO YOUR CUSTOMERS ARE] • Tone/brand voice: [PROFESSIONAL / FRIENDLY / FUN / EDUCATIONAL] • Current promotions: [ANY SALES OR EVENTS] • Topics to highlight: [PRODUCTS / SERVICES / BEHIND-THE-SCENES / TIPS] **Format:** 5 posts (Mon-Fri). For each: platform (FB/IG/LinkedIn), post text under 100 words, suggested image idea, 3-5 hashtags.

Email Newsletter

Role: Act as an email marketing specialist for small businesses. **Task:** Write a monthly email newsletter. **Context:** • Business: [NAME AND WHAT YOU DO] • This month's focus: [MAIN TOPIC OR PROMOTION] • News to share: [UPDATES, NEW PRODUCTS, EVENTS] • Helpful tip for customers: [RELEVANT ADVICE] • Call to action: [WHAT YOU WANT THEM TO DO] **Format:** Subject line + 200-300 word email. Conversational tone. Include clear sections. End with one specific CTA.

Google/Yelp Review Response

Role: Act as a business owner responding to online reviews. **Task:** Write a response to a customer review. **Context:** • Review type: [POSITIVE / NEGATIVE / MIXED] • What they said: [KEY POINTS FROM REVIEW] • Their name: [NAME IF SHOWN] • Anything to address: [SPECIFIC CONCERNS OR PRAISE] **Format:** Thank them by name. For positive: express genuine appreciation, mention something specific. For negative: apologize, offer to make it right, take conversation offline. 50-75 words.

SALES & PROPOSALS

Sales Proposal / Quote Email

Role: Act as a professional sales consultant for a small business. **Task:** Write an email presenting a quote or proposal. **Context:** • Client name: [NAME] • What they requested: [SERVICE OR PRODUCT] • Price/quote: \$[AMOUNT] • What's included: [SCOPE OF WORK] • Timeline: [DELIVERY OR COMPLETION DATE] • Why us: [1-2 DIFFERENTIATORS] **Format:** Professional but warm. Summarize what they get, state the price confidently, explain next steps to proceed. 150-200 words.

Follow-Up on Unpaid Invoice

Role: Act as a business owner following up on payment. **Task:** Write a polite reminder about an unpaid invoice. **Context:** • Client name: [NAME] • Invoice number: [NUMBER] • Amount due: \$[AMOUNT] • Original due date: [DATE] • Days overdue: [X] • Payment methods accepted: [OPTIONS] **Format:** Friendly but clear. Assume good intent (they may have forgotten). State the amount and how to pay. Offer to answer questions. 75-100 words.

Winning Back a Lost Customer

Role: Act as a business owner reaching out to a lapsed customer. **Task:** Write an email to re-engage a customer who hasn't purchased in a while. **Context:** • Customer name: [NAME] • Last purchase: [WHAT AND WHEN] • Time since last contact: [X MONTHS] • Incentive to offer: [DISCOUNT / FREE ITEM / EXCLUSIVE ACCESS] • What's new: [NEW PRODUCTS, IMPROVEMENTS, NEWS] **Format:** Warm, not desperate. Acknowledge it's been a while. Mention what's new. Offer incentive with clear expiration. 100 words max.

OPERATIONS & DOCUMENTATION

Standard Operating Procedure (SOP)

Role: Act as an operations consultant who writes clear process documentation. **Task:** Write a standard operating procedure for a business process. **Context:** • Process name: [WHAT THE TASK IS] • Purpose: [WHY THIS PROCESS EXISTS] • Who performs it: [ROLE/POSITION] • Steps involved: [LIST THE MAIN STEPS] • Tools/systems needed: [SOFTWARE, EQUIPMENT] • Common mistakes to avoid: [PITFALLS] **Format:** Clear numbered steps. Each step is one action. Include any decision points. Add notes or tips where helpful.

Employee Handbook Section

Role: Act as an HR professional writing policy documentation. **Task:** Write a section for an employee handbook. **Context:** • Topic: [PTO / DRESS CODE / REMOTE WORK / EXPENSES / ETC.] • Our policy: [KEY RULES AND GUIDELINES] • Exceptions: [ANY SPECIAL CIRCUMSTANCES] • Who to contact with questions: [PERSON/ROLE] **Format:** Clear and professional. Use plain language, not legal jargon. Explain the "why" briefly. 200-300 words.

Meeting Agenda

Role: Act as a professional meeting facilitator. **Task:** Create an agenda for an upcoming meeting. **Context:** • Meeting purpose: [MAIN GOAL] • Attendees: [WHO'S COMING] • Duration: [LENGTH IN MINUTES] • Topics to cover: [LIST ITEMS] • Decisions needed: [ANY ITEMS REQUIRING VOTE/APPROVAL] • Pre-work required: [ANYTHING ATTENDEES SHOULD PREPARE] **Format:** Include time allocations for each item. Start with most important items. End with action items/next steps. Keep it realistic for the time allotted.

HIRING & HR

Job Posting

Role: Act as a recruiter writing compelling job postings. **Task:** Write a job posting for an open position. **Context:** • Job title: [TITLE] • Company: [NAME AND BRIEF DESCRIPTION] • Key responsibilities: [3-5 MAIN DUTIES] • Required qualifications: [MUST-HAVES] • Preferred qualifications: [NICE-TO-HAVES] • Salary range: [IF DISCLOSING] • Benefits highlights: [KEY PERKS] • Location/Remote: [DETAILS] **Format:** Engaging opening about the opportunity. Clear sections for responsibilities and qualifications. Sell the company culture briefly. 300-400 words.

Interview Questions

Role: Act as an experienced hiring manager. **Task:** Generate interview questions for a position. **Context:** • Position: [JOB TITLE] • Key skills needed: [CRITICAL ABILITIES] • Team dynamics: [WHO THEY'LL WORK WITH] • Biggest challenges of the role: [WHAT MAKES IT HARD] • Culture fit indicators: [WHAT TYPE OF PERSON THRIVES HERE] **Format:** 10 questions mixing behavioral ("Tell me about a time..."), situational ("What would you do if..."), and skill-based. Include what a good answer looks like for top 3 questions.

Performance Review Talking Points

Role: Act as a manager preparing for a performance review. **Task:** Help me prepare talking points for an employee review. **Context:** • Employee role: [POSITION] • Strengths observed: [WHAT THEY DO WELL] • Areas for improvement: [WHERE THEY NEED GROWTH] • Specific examples: [CONCRETE SITUATIONS] • Goals for next period: [WHAT SUCCESS LOOKS LIKE] • Overall rating: [EXCEEDS / MEETS / BELOW EXPECTATIONS] **Format:** Balanced feedback structure. Lead with strengths. Frame improvements constructively. End with clear, actionable goals. Suggest how to open the conversation.

QUICK-USE TEMPLATES

Copy these when you're short on time:

Quick Customer Reply

Write a friendly 50-word response to this customer message: [PASTE MESSAGE]. My business is [WHAT YOU DO]. Answer their question and offer to help further.

Instant Social Post

Write a [FACEBOOK/INSTAGRAM/LINKEDIN] post for my [TYPE OF BUSINESS] about [TOPIC]. Keep it under 50 words, include a question to boost engagement, suggest 3 hashtags.

Quick Email Draft

Write a professional email to [RECIPIENT] about [TOPIC]. Key points to include: [LIST 2-3 POINTS]. Tone: [FORMAL/CASUAL]. Keep it under 100 words.

Summarize This Document

Summarize the following document in 5 bullet points, highlighting the key takeaways and any action items: [PASTE DOCUMENT]

TIME-SAVING WORKFLOWS

Weekly Social Media: 30 minutes instead of 3 hours

1. Use social media calendar prompt for 5 posts (5 min)
2. Review and adjust for your voice (10 min)
3. Create or gather images (10 min)
4. Schedule in your posting tool (5 min)

Customer Email Responses: 2 minutes instead of 15

1. Paste customer email into AI
2. Add context about your answer
3. Get draft response
4. Quick personalization and send

Monthly Newsletter: 20 minutes instead of 2 hours

1. Jot down 3-4 topics to cover
2. Use newsletter prompt with topics
3. Review and add personal touches
4. Add images and send

TIPS FOR SUCCESS

DO THIS	DON'T DO THIS
Always review AI output before sending	Send AI output without reading it
Add personal details AI can't know	Include confidential info in free tools
Keep prompts saved for reuse	Expect AI to know your business without context
Iterate: "shorter," "more casual," etc.	Use generic prompts expecting specific results
Use AI for first drafts, then make it yours	Forget to verify facts, numbers, and claims

ADVANCED MOVES

Create Your Voice Clone

Give AI examples of your writing so it matches your style:

Here are 3 emails I've written to customers. Study my tone, vocabulary, and style: [PASTE YOUR EMAILS] Now write a new email to [SITUATION] in my voice.

Build a Business Knowledge Base

Create a document with info AI should always know about you:

When writing content for my business, know that: • Business name: [NAME] • What we do: [DESCRIPTION] • Our customers are: [TARGET AUDIENCE] • Our tone is: [PROFESSIONAL/CASUAL/FRIENDLY/AUTHORITATIVE] • We always mention: [KEY DIFFERENTIATORS] • Never use these words: [TERMS TO AVOID] • Our hours/location: [DETAILS] Paste this at the start of prompts for consistent, on-brand output.

Batch Your Content

Instead of one piece at a time:

Create a month of content for my [TYPE OF BUSINESS]: • 4 weekly email subject lines + key points • 12 social media post ideas with captions • 2 blog post outlines • 4 promotional messages for [UPCOMING SALE/EVENT] Make everything consistent with our brand voice: [DESCRIBE TONE].

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QuidAI - AI Business Services

Thank you for attending the Rose Creek Golf Club AI Workshop.
Questions about implementing AI in your business? Reach out anytime.

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