



The Business Growth Association  
Of America

## COURSE 8

# Practical AI for Small Business

Basic uses and implementation: save 5-10 hours a week  
using AI assistants safely, with no technical background.

**\$1,000 - \$2,000**

estimated yearly savings  
from AI-assisted work

**1% - 10%**

potential  
sales growth

30-60 minutes per week | Start with free or low-cost plans

# Course Overview

**THE PROMISE** Save 5-10 hours a week and improve customer service, marketing, and admin work by using AI assistants safely, starting with simple tasks and building up to automated workflows, with no technical background needed.

## Core Idea

You don't need an "AI strategy." You need to find the repetitive, time-consuming tasks in your business and hand the first draft of them to AI, while a human stays in charge of the final result.

**THE RULE OF THE COURSE** AI drafts, you decide.

## What "AI" Means Here

### AI assistants

Such as Claude, ChatGPT, and Gemini.

### AI inside your tools

Features already in email, Canva, accounting software, and your CRM.

### Simple automations

Simple connections that link your assistants and tools together.

## Format for Every Step

- 30-60 minutes per week
- Each step ends with a clear **"done when"** checkpoint
- Start with free or low-cost plans

## Roadmap

| Phase         | Timeline   | Goal                                                                                 | Output                                           |
|---------------|------------|--------------------------------------------------------------------------------------|--------------------------------------------------|
| 1. Foundation | Month 1    | Understand what AI can and can't do, set safety rules, and get your first quick wins | AI Use Policy, Prompt Library, 3 target tasks    |
| 2. Core Uses  | Months 2-3 | Use AI weekly in the most common small-business areas                                | 8+ real tasks done with AI and time saved logged |

# Why Use AI Yourself?

*Outsourced writing, admin help, and extra software add up. AI assistants, used safely, take on first drafts so you can do more in-house.*

**\$1,000 - \$2,000**

Estimated yearly savings when AI handles first drafts and you handle the decisions

**1% - 10%**

Potential sales growth from faster replies, steadier marketing, and more time to sell

## Where the Savings Come From

- **Hours back every week.** The course targets 5-10 hours a week saved on drafting, summarizing, and admin, tracked in your AI Wins Tracker.
- **Less outsourcing of first drafts.** Emails, posts, product descriptions, job ads, proposals, and SOPs can be drafted in-house.
- **Start free or low-cost.** The course begins with free or low-cost plans and AI features already inside tools you use.
- **Reuse what works.** A Prompt Library and Voice Guide mean you stop starting from scratch on every task.
- **Fewer costly mistakes.** An AI Use Policy and review rules help you avoid sharing private data or sending unchecked claims.

## Where the Sales Growth Comes From

- **Faster, more consistent customer replies,** follow-ups, and quote emails.
- **Steady marketing content** (posts, newsletters, FAQs, product descriptions) that keeps you visible.
- **More time for selling and serving customers,** with research and sales call prep done faster.

| Track Your Results            | Month 1 baseline | Month 3 | Month 12 |
|-------------------------------|------------------|---------|----------|
| Hours saved per week          |                  |         |          |
| Yearly outsourced task spend  |                  |         |          |
| Customer reply time           |                  |         |          |
| Sales growth vs. baseline (%) |                  |         |          |

*Savings and growth figures are estimates of potential, not guarantees. Actual results vary by business, industry, and how consistently the plan is carried out. AI output should always be reviewed by a person before it is used.*

## Get Comfortable and Safe (Foundation)

*Goal: Understand what AI can and can't do, set safety rules, and get your first quick wins.*

### Week 1: AI in plain language

- What AI assistants are good at (drafting, summarizing, brainstorming, organizing, answering questions) and where they fail (they can state wrong things confidently, don't know your private business details unless you tell them, and aren't a lawyer, accountant, or doctor).
- Create your account on one assistant and run the "First 5 Prompts" exercise (summarize this email, rewrite this message, brainstorm names, explain this concept, make a checklist).

**DONE WHEN** you've completed 5 prompts and can explain what AI is to your team.

### Week 2: Learn to ask well (prompting basics)

- The simple formula: Role + Task + Context + Format (e.g. "You are a friendly customer service rep for a landscaping company. Write a reply to this complaint. Keep it under 120 words and offer a free re-visit.").
- Practice improving results by following up ("shorter," "more formal," "add a clear next step").

**DONE WHEN** you've saved 5 prompts that work for you in a "Prompt Library" document.

### Week 3: Set your AI safety rules

- **Never paste:** customer personal data, passwords, financial account numbers, health information, or confidential contracts into tools without understanding the privacy settings. Learn how to check whether a tool uses your data for training and how to turn that off.
- **Always:** review and fact-check before sending anything, never present AI output as final without a human read, and check legal or tax questions with a professional.

**DONE WHEN** you have a one-page AI Use Policy (template provided) your team has read.

### Week 4: Find your best opportunities

- Use the "Time Drain Audit": list your weekly tasks, mark the ones that are repetitive, text-based, and low-risk, and rank them by hours spent.
- Choose your top 3 tasks to try with AI.

**DONE WHEN** you have a ranked list of AI opportunities.

**DELIVERABLE** AI Use Policy, Prompt Library (5+ prompts), and a ranked list of 3 target tasks.

## Put AI to Work in Daily Tasks

*Goal: Use AI weekly in the five most common small-business areas (Core Uses).*

### Month 2: Communication and marketing

- **Customer emails and replies:** drafting responses, follow-ups, quote emails, and review replies in your brand voice (build a "Voice Guide" prompt).
- **Content:** social post ideas, captions, newsletters, product descriptions, FAQ answers, and job ads.
- **Design and visuals:** AI features in Canva for resizing and quick image edits (link to Course 4).
- Always review for accuracy, tone, and claims you can't back up.

### Month 3: Operations, sales, and admin

- **Meeting and call notes:** summarize transcripts into action items.
- **Documents:** first drafts of proposals, SOPs (standard operating procedures), training guides, and policies (reviewed by a professional where legal).
- **Data and spreadsheets:** ask AI to explain a report, clean up a list, write a spreadsheet formula, or spot trends in sales numbers (use anonymized data).
- **Research:** compare competitors, summarize industry articles, prepare for sales calls.

**DONE WHEN** you've used AI on at least 8 real tasks and logged time saved in a simple "AI Wins Tracker."