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SMALL BUSINESS AI KIT · FREE SAMPLE

Small Business AI Kit

Choose, test, and document one useful AI workflow without gambling with customer trust

IN THIS SAMPLE

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4. Workbook: Recurring Task Inventory

\$39

FULL KIT · GUIDE, FILLABLE WORKBOOK, QUICK REFERENCE, PHONE REFERENCE, PROMPT LIBRARY, TRACKER SPREADSHEET

Less content. More use.

What This Is, Who It Is For

FIT What this is

This is an implementation kit for a small-business owner or team choosing its first serious AI-assisted workflow. It covers task selection, data boundaries, source control, prompt design, review, pilot measurement, and an operating procedure.

FIT Who this is for

For a small-business owner, operator, or team lead evaluating a first AI-assisted workflow and remaining accountable for its data, review, and final action.

By the end, you will have:

- A ranked inventory of recurring tasks and one defensible pilot candidate.
- A written data boundary, source-of-truth list, prompt, examples, and review rubric.
- A measured pilot and a go, revise, or stop decision backed by evidence.

WHAT THIS IS NOT

It is not a catalog of AI apps, a promise of automatic income, legal or security advice, or permission to let a model make unreviewed customer, employment, financial, health, or legal decisions.

Your First Seven Days

Keep the first experiment narrow. One workflow, one owner, sanitized examples, and a human reviewer are enough to learn whether the idea deserves a real pilot.

WORKFLOW The Sequence

1. List ten recurring tasks and circle three with clear inputs, outputs, and quick human review.
2. Choose one low-risk workflow and write the allowed, restricted, and prohibited data rules.
3. Build the prompt, source set, examples, edge cases, and five-check review rubric.
4. Run 10 to 20 representative items, track total time and corrections, then decide whether to scale, revise, or stop.

STOPPING POINT

Do not connect the pilot to automatic sending, publishing, payment, hiring, eligibility, or account decisions. Prove the reviewed workflow first.

1. Start with a Task, Not a Tool

Buying an AI subscription does not create business value. Begin with a recurring task that already consumes time, has a recognizable output, and can tolerate a draft that a person reviews.

WHEN YOU'RE DONE

You have one real task to evaluate, described without vendor language.

CHECKLIST

Do this now

- ☐ Name the recurring task and who currently performs it.
- ☐ Estimate frequency, time per occurrence, and the cost of a poor result.
- ☐ Describe the output in plain language and identify who uses it next.
- ☐ Reject tasks where an unreviewed error could cause serious harm or loss.

GOOD FIRST CANDIDATE

Drafting a follow-up email from approved meeting notes is easier to test than asking AI to decide which customer receives a refund.

Reflection: Which repeated task is annoying, bounded, and easy for a person to review?

Recurring Task Inventory

Find real work before evaluating tools.

WORKSHEET

Recurring Task Inventory

Task and Current Owner:

Frequency and Minutes per Item:

Input and Output:

What Makes a Result Acceptable:

Want the rest of Small Business AI Kit?

A polished demo can hide weak facts, sensitive-data exposure, and expensive cleanup. This kit helps you test a narrow workflow under real conditions before it affects customers, employees, money, or your reputation.

THE FULL KIT INCLUDES

- Guide (Letter and A4)
- Fillable workbook (Letter and A4)
- Quick reference (Letter and A4)
- Phone reference
- Prompt library
- Tracker spreadsheet (CSV)

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