



Using AI to Improve Profits and Efficiencies in Your Small Business

AI Essentials for Business Workshop Series Handout



Workshop Companion

Your Take-Home Guide

AI Essentials for Business

Workshop Companion — Your Take-Home Guide

Three hours of live demos and hands-on learning. No technical experience required. This booklet mirrors what we covered today — keep it, and use it the first week you're back at your desk.

Hour 1 Why AI matters for your business, and the concepts underneath it	Hour 2 Three tools, three live demos, three real businesses	Hour 3 Prompting frameworks, data safety, and your action plan
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The Promise

Owners save close to 7 hours a week on administrative work once they start using these tools — that's the JPMorgan Chase Institute, not a tech company's marketing. The goal for today wasn't to sell you one app. Tools change every month. What you learned today are the concepts underneath — those don't expire.

Three Myths, Busted

"I don't have time"

You're right that you don't have time — that's exactly why this is worth doing. One hour invested this week, 5–7 hours returned every week after.

"It will replace people"

- 82% of small businesses using AI grew their team over the past year — U.S. Chamber of Commerce
- 87% of owners say it augments their staff, not replaces them — Goldman Sachs, surveying 10,000 small businesses
- 55% of employers who laid people off for AI now regret it — Forrester. Most didn't have a working AI system in place when they made the cut.

It's not AI versus your employees. A team using AI will replace a team that doesn't.

"It makes things up"

These tools give you a wrong answer with exactly the same confidence as a right one. AI drafts. You decide. Never send, sign, or publish without reading it yourself first.

Your Competitors Are Here

Generative AI use among small businesses jumped from 40% to 58% in a single year — U.S. Chamber of Commerce, August 2025. Some of your competitors have already started. The only real question is whether you're ahead of them or behind.

Meet Your Three Tools

ChatGPT — the versatile all-rounder

Drafting, brainstorming, images, voice. Custom GPTs let you build a reusable assistant that always follows the same instructions.

Claude — the writer-builder

Long documents and deep analysis. Creates real Word, Excel, and PowerPoint files — not just text you have to reformat. Office add-ins on paid plans.

NotebookLM — the grounded researcher

Answers only from documents you upload. Every answer shows a citation. Turns documents into a podcast-style audio overview.

WHICH TOOL WHEN

Writing or building a file → Claude

A quick, versatile task → ChatGPT

Questions about your own documents → NotebookLM

All three free tiers are genuinely capable in 2026 — free Claude already includes file creation. Only upgrade once you're actually hitting a daily limit, not before. Prices change almost every month; check each tool's current pricing page rather than trusting an old number.

Talking to the Machine

Three questions, every time you prompt.

Context — what's the situation?

Task — what do you want?

Constraints — what are the rules for what comes back?

What actually works: background, examples, and a clear sense of the format you want back. You already have all of that — it's your business. You don't need a clever trick. You need to describe what you already know, clearly. ("You are a world-class expert...", tipping, ALL CAPS, "take a breath" — tested in 2026, measured effect: zero.)

CRAFT — For Higher-Stakes Work

Once you're comfortable with the basics, CRAFT is the more powerful version for client-facing work or anything you'll reuse.

C — Context: who are you, what's the situation?
R — Role: who should the AI be?
A — Action: what exactly do you want?
F — Format: how should it look?
T — Tone: how should it sound?

Use the three basic questions for everyday tasks. Save CRAFT for client-facing work or anything you'll reuse over and over — that's where role and tone start to matter.

Three Businesses, Three Wins

Today's demos, in case you want to picture your own version of each.

Metro Plumbing Supply — ChatGPT

Jennifer handles every complex commercial quote, and a lot of what she knows only lives in her head. We built a Custom GPT loaded with her FAQ so it answers quote requests the same way every time — even on the days she's out. Quote emails: 20 minutes down to about 3 minutes of review. It didn't replace Jennifer. It cloned her Tuesday-afternoon patience, on the days she doesn't have any left.

Riverside Insurance Agency — Claude

An agent needed to quote commercial auto coverage for a landscaping fleet, with a 40-page underwriting guide standing between them and the meeting. Claude read the guide and produced a client-ready one-page summary of the relevant requirements. Client prep: 90 minutes down to about 10. It's not about the minutes — it's about walking into that meeting already prepared, instead of scrambling.

Precision Marketing — NotebookLM

An 8-person agency had SOPs scattered across five places, and a new hire starting Monday. NotebookLM answered a real onboarding question directly from the SOPs, with a citation linking back to the source passage — it didn't just answer, it showed its work. The same documents became a 10-minute audio overview for the commute in. New-hire questions: self-serve.

The Scoreboard

Task	Before	After
Quote emails	20 min	3 min
Client prep	90 min	10 min
New-hire questions	Interrupts a colleague	Self-serve

The One Rule

Wouldn't post it publicly? Don't paste it in.

Safe: marketing drafts, brainstorming, generic templates. Not safe on consumer tiers: customer PII, financials, HR records. Business and team tiers don't train on your data by default — that's what you're paying for. See the full Safe Data Checklist handout for the complete list.

AI Output Is Your Output

If AI writes it, and you send it, you wrote it. You're responsible for factual errors, copyright issues, and bad advice that reaches a client. Always keep a human in the loop.

Your First Week, Month, and Quarter

THIS WEEK

One task, one tool.

THIS MONTH

Flip the privacy toggle off. Try creating a real file. Track your hours saved on paper.

NEXT QUARTER

Once you're saving 5+ hours a week, upgrade one power user to a paid plan.

Thursday, 4pm.

Caught up. Doing work only you can do.

What You're Walking Out With Today

- The CRAFT Prompting Framework — full detail in the AI Prompt Reference Sheet
- The Safe Data Checklist
- Your 30-60-90 Day AI Roadmap
- Your first AI Quick Win Worksheet

Don't wait for perfect. Start today!

Thank You

Thanks for spending your time with us. Reach out anytime with questions about your specific business — that's what the follow-on sessions are for. Check appliedmomentum.us for upcoming classes.

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