



Using AI to Improve Profits and Efficiencies in Your Small Business

AI Essentials for Business Workshop Series Handout



AI Quick Win Worksheet

Your First Step to AI Implementation

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Work through all five steps during or after the workshop. Be specific at every step — vague goals lead to vague results. Set aside 15 to 20 minutes. By Step 5 you'll have a tested prompt, a real ROI number, and a training session scheduled with at least one team member.

Step 1 — Identify Your Time Drain

Find a task you or your team do repeatedly that meets all four of these:

- Takes 15 or more minutes each time it comes up
- Happens at least weekly — daily is even better
- Involves writing, research, or analysis
- Doesn't require your unique expertise or on-the-spot judgment

The task I'm targeting:

Be specific. "Responding to vendor price requests" beats "emails."

Why this task is a good fit for AI:

Step 2 — Calculate Your ROI

Run the numbers before you commit. Two minutes, and it turns a gut feeling into a business decision.

Task	Current Time	With AI	Saved
Customer emails	15 min each	2 min each	13 min each
Research / reports	6 hrs per project	3.5 hrs	2.5 hrs
Document review	4 hrs per doc	1 hr	3 hrs

Reference benchmarks — your numbers will vary.

- Current time per task: _____ minutes
- Times per month: _____
- Total monthly time: _____ min ÷ 60 = _____ hrs
- Your hourly cost (salary or billable rate): \$_____ / hour
- Monthly cost of this task: _____ hrs × \$_____ = \$_____
- Estimated time saved with AI (50–70%): _____ hrs / month
- Estimated monthly cost savings: \$_____ / month

Step 3 — Build Your First Prompt

Use the Context / Task / Constraints framework from class. Fill in the brackets, then refine from there.

TEMPLATE

Context: [the situation and background]

Task: [exactly what you want]

Constraints: [length, tone, format, what to avoid]

EXAMPLE

Context: I'm the office manager for a 12-person HVAC contractor. A repeat customer is asking about a delayed equipment order.

Task: Write a professional email response that acknowledges the delay, explains we're looking into it, and offers a 10% discount on their next service call.

Constraints: Under 150 words, warm but professional.

My prompt for this task — write it out completely, you'll copy and paste this on Monday:

Step 4 — Test and Refine Over 3 Days

Don't expect perfection on the first try. Run it, review it, refine it. Three passes is usually all it takes.

Day 1 — Run your prompt. What worked? What was missing or off?

Day 2 — Add the context you left out. Adjust tone or length. How much did it improve?

Day 3 — Compare the AI output to your normal work. What's the actual time difference?

Time saved after Day 3: _____ (compare minutes, not impressions)

Step 5 — Train Your Team

AI saves you time. Multiplying it across your team saves the business time. Identify who should learn this task and schedule the conversation now.

- Who on your team will use this AI task? (name and role): _____
- Training session date and time: _____
- What they need to know: the prompt, when to use it, what to review before sending

First-Week Success Checklist

- Used AI for this task at least 3 times
- Measured and recorded actual time saved
- Refined your prompt based on real results
- Trained at least one team member on the task
- Saved your final prompt where your team can find it

After Your First Win

Go back to Step 1 and identify your second use case. Build your AI capability one task at a time. By day 90 you'll have a company prompt library, a trained team, and a clear picture of hours and dollars returned to your business. Track everything — hours saved, errors caught, tasks completed faster. That data is what makes the ROI conversation simple.

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