



Using AI to Improve Profits and Efficiencies in Your Small Business

AI Essentials for Business Workshop Series Handout



AI Resources and Tutorials

Your Curated Guide to Learning More — Updated July 2026

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Applied Momentum | AI Essentials for Business | Steven Schain | appliedmomentum.us

Pricing and features below reflect publicly available information as of the workshop date. AI moves fast — review this quarterly, and always check the vendor's own pricing page before you commit to a plan.

Your Three Core Tools

ChatGPT by OpenAI

- Free sign-up: chatgpt.com | Help: help.openai.com
- Free: GPT-5.5 Instant, roughly 10 messages every 5 hours
- Go — \$8/month: 10x more messages, unlimited GPT-5.3 Instant, file uploads, image creation
- Plus — \$20/month: GPT-5.5, Deep Research, Sora, Agent Mode
- Pro — \$100–\$200/month: highest usage limits, full model suite
- Business — from \$20/seat/month (annual): team workspace, admin controls

Claude by Anthropic

- Free sign-up: claude.ai | Help: support.anthropic.com
- Free: 30–100 messages/day depending on complexity, includes file creation
- Pro — \$20/month (\$17/month billed annually): 5x usage, Claude Cowork, Projects
- Max — \$100–\$200/month: for people working in Claude throughout the day
- Team — from \$20–\$25/seat/month, 5-seat minimum: shared workspace, admin controls
- Enterprise — custom pricing: extended context, HIPAA-ready compliance tooling

Google NotebookLM

- Access: notebooklm.google.com (Google account required)
- Free: standard access, generous source and chat limits
- NotebookLM Plus — bundled into Google AI Plus, \$7.99/month: more sources per notebook, higher generation limits
- Higher tiers (Google AI Pro / Ultra, \$19.99–\$200/month) add Gemini Advanced and more storage — most small businesses won't need these for NotebookLM alone

Worth knowing about — Google Gemini

Gemini isn't one of the three tools this class teaches, but if your business already lives in Google Workspace (Docs, Sheets, Gmail), it's worth a look for the same kind of drafting ChatGPT handles — with tighter integration into files you already have. Free at gemini.google.com; paid tiers bundle with Google AI Plus/Pro/Ultra above.

Prompt Engineering and Best Practices

Free courses and guides

- Anthropic Prompt Engineering Guide — clear, beginner-friendly, built for business users
- OpenAI Prompt Engineering Guide — practical tips for ChatGPT
- Anthropic Prompt Library — ready-to-use example prompts

YouTube channels

- AI Explained — clear explanations without the hype
- Matt Wolfe — AI tools and practical business applications
- The AI Advantage — productivity-focused walkthroughs

Business-Specific AI Applications

Marketing and content

- Canva Magic Studio — AI-powered design and social assets. Free tier; Pro from \$15/month
- Jasper — marketing content with brand-voice consistency. From \$49/month

Customer service

- Zendesk AI — customer service automation
- HubSpot AI — AI-driven CRM and after-hours chat. Free CRM; paid tiers vary

Document processing and research

- Otter.ai — meeting transcription and notes
- Notion AI — drafts, summarizes, and restructures docs and SOPs. AI add-on from \$10/month

Finance and operations

- QuickBooks Online with Intuit Assist — auto-categorizes transactions, plain-English summaries. From \$35/month
- Grammarly Business — writing assistant for consistent brand voice. Business from \$15/user/month

Staying Current

Newsletters (free)

- The Rundown AI — daily news in 5 minutes
- TLDR AI — tech-focused updates
- The Neuron — business-focused AI news

Sites and directories

- There's An AI For That — searchable tool directory by use case
- Anthropic News and OpenAI Blog — updates straight from the source

AI Safety and Data Privacy

- Anthropic Responsible Scaling Policy — how Claude is built with safety in mind
- OpenAI Safety Best Practices — guidelines for responsible use
- FTC AI Guidelines for Business — legal considerations when using or marketing AI

See the Applied Momentum Safe Data Checklist handout for the full list of what never goes into a public AI tool.

Your Week 1 Action Checklist

- Create free accounts on ChatGPT, Claude, and NotebookLM
 - Complete one beginner tutorial for each tool
 - Test the prompt you wrote in class on your own Quick Win Worksheet
 - Bookmark 2–3 resources from this guide
 - Subscribe to one AI newsletter
 - Identify one repetitive task to test with AI this week
 - Share one AI win with your team by Friday
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Important Notice

All tool links, pricing, and feature descriptions reflect publicly available information as of the workshop date. Pricing tiers and feature availability change — verify current pricing and capabilities directly with each vendor before purchasing. Their inclusion here does not constitute an endorsement or guarantee of performance; results vary by business context. Nothing in this guide constitutes legal, financial, or technology advice. Before implementing AI tools in regulated industries, consult qualified professionals to ensure compliance with applicable laws, including HIPAA, GDPR, and CCPA. This guide has no affiliate relationships with any tool or service listed. © 2026 The 3D Professor, LLC, d/b/a Applied Momentum.