



Using AI to Improve Profits and Efficiencies in Your Small Business

AI Essentials for Business Workshop Series Handout



Presenter Prompt & Demo Materials Guide

AI Essentials for Business — Internal Presenter Reference

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This is a working document for the presenter, not a class handout. It contains the exact prompts to run live during each of the four scripted demos, plus the sample source files each demo needs. Rehearse each one before class — the outline calls the cold-open demo and the underwriting-guide demo the two most important credibility moments in the class.

Every prompt below is written to be copied and pasted as-is. Bracketed instructions like [PASTE SOURCE HERE] tell you where to drop the source material — they are not part of the prompt.

Demo 1 — Cold Open (Slide 2, Claude)

This is the first thing the room sees. No slide talk beforehand — switch straight to your live Claude screen, run this, and let the file open on screen before you say anything.

Source material — the "messy paragraph"

Paste this exactly as written, or swap in your own real numbers if you want it to feel less rehearsed. Either works — the point is that it is unformatted, run-on, and human, not a spreadsheet.

SAMPLE INPUT

Ok here's where we're at — January we brought in about 42k, February was slower at 31k, March picked back up to 47,500. Rent is 3,200 a month, payroll runs around 18k most months but it was 21k in March because we brought on the new hire. Utilities and insurance together are usually about 1,400. We paid the equipment loan down by 2,500 in Feb only, otherwise it's been quiet since December. Software subscriptions are creeping up, probably 600ish a month now. Had a one-time 6k marketing push in January for the spring campaign. Owner draw has been 5k a month pretty steady. Trying to figure out where we stand heading into April and whether we can afford another hire.

The prompt

CLAUDE PROMPT

I'm going to paste some rough numbers about my business income and expenses over the last three months. Turn this into a clean, simple cash-flow spreadsheet – one column per month (January, February, March), rows for revenue and each expense category, and a net cash flow total at the bottom. Add a fourth column projecting April based on the trend. Keep the formatting simple enough that I could update it myself next month without help.

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Presenter notes: paste the prompt, then the numbers, in one message. When the file is ready, download it and open it in Excel on screen — don't just show the chat response. Total time under 60 seconds. Say nothing while it runs; let the room watch.

Demo 2 — Metro Plumbing Supply (Slide 31, ChatGPT)

Scenario: a 15-person commercial plumbing distributor. Jennifer Harlow handles complex commercial quotes and a lot of what she knows only lives in her head.

Source material 1 — Jennifer's Commercial Quoting FAQ

FAQ DOCUMENT TO UPLOAD

Q: What's our standard markup on commercial fixture orders?

A: 22% over distributor cost for orders under \$10,000; 18% for orders \$10,000 and up. Contractors with a standing account get an additional 3% off.

Q: What's our lead time on special-order commercial fixtures?

A: 10-14 business days from manufacturers we stock regularly (Moen Commercial, Sloan, Zurn). 3-4 weeks for anything outside our core vendor list – always confirm with the vendor before quoting a date.

Q: Do we offer net terms on commercial accounts?

A: Net 30 for established accounts with 6+ months of on-time payment history. New commercial accounts start on a credit card or COD basis for the first 90 days.

Q: How do we handle a rush order?

A: Rush orders (under 5 business days) carry a 15% expedite fee on top of standard pricing. We only guarantee rush timing on items we stock in our own warehouse.

Q: What's our return policy on special-order items?

A: Special-order items are non-returnable once ordered from the manufacturer. Stocked items can be returned within 30 days with a 15% restocking fee if the box is opened.

Q: Who approves quotes over \$15,000?

A: Route it to Dave or Steven for a second signature before it goes out.

Q: What do we tell a customer whose order is delayed by a supplier?

A: Be upfront immediately, give the best available new date, and offer an in-stock equivalent substitute if one exists. Never let a customer find out from the delivery truck.

Q: Do we price-match competitors?

A: We'll match a documented written quote from a comparable distributor (not a big-box store) on identical SKUs, case by case, with ownership sign-off on anything over \$2,000.

Source material 2 — the customer email to reply to

SAMPLE CUSTOMER EMAIL

Subject: Order delay on our fixture order

Hi Jennifer, just checking in – we were told our commercial fixture order (PO #4471) would ship this week but haven't heard anything. We've got a job site waiting on this. Can you give me an update? We've been ordering from you guys for years and this is the first time we've had to chase a status. – Mike, Coastal Plumbing & Mechanical

The prompt

CHATGPT PROMPT

I'm going to give you two things: our company's internal FAQ document, and an email from a customer. I run Metro Plumbing Supply, a 15-person commercial plumbing distributor. Using only the information in the FAQ, draft a reply to this customer's email in our company's voice – warm, direct, no corporate jargon. Acknowledge the delay honestly, give a realistic next step, and don't promise anything the FAQ doesn't support. Under 150 words.

FAQ:

[PASTE JENNIFER'S FAQ HERE]

CUSTOMER EMAIL:

[PASTE MIKE'S EMAIL HERE]

Optional — building the Custom GPT (Slide 32 screenshots)

If capturing screenshots ahead of time for Slide 32, use this as the Custom GPT's instructions field:

CUSTOM GPT CONFIGURATION

You are Metro Plumbing Supply's quoting assistant. Answer only using the attached FAQ document. If a question isn't covered in the FAQ, say so plainly and suggest the customer confirm with Jennifer or ownership directly – never guess at pricing, lead times, or policy.

Presenter notes: upload the FAQ, paste the prompt with the customer email, and let it run — one live prompt only. Move to the prepared Slide 32 screenshots rather than exploring further live.

Demo 3 — Riverside Insurance Agency (Slide 35, Claude)

Scenario: a 12-person independent agency. A landscaping company with 8 commercial trucks wants auto fleet coverage, and the agent has a 40-page underwriting guide to work from before tomorrow's meeting. This is the most important live demo in the class — rehearse it more than any other.

Source material — underwriting guide excerpt

The real guide runs 40 pages. For a live demo you don't need the whole thing — the excerpt below covers the sections relevant to an 8-truck landscaping fleet and is realistic enough to produce a genuine, useful output. If you have an actual underwriting guide from a real carrier you're licensed to use for teaching, substitute it here; otherwise upload this excerpt as a Word or PDF file.

COMMERCIAL AUTO FLEET UNDERWRITING GUIDE — CONDENSED EXCERPT (SECTIONS 3–6)

Section 3.2 — Commercial Fleet Eligibility

Fleets of 3–25 vehicles are eligible under the standard commercial auto program. Vehicles must be rated Class 4 (14,001–16,000 lbs GVW) or lighter for standard rating; anything heavier requires referral to the heavy fleet desk. Landscaping and lawn care operations are an approved class, provided no more than 20% of vehicle-miles involve hauling hazardous materials (fuel, fertilizer concentrate) beyond standard job-site quantities.

Section 3.4 — Driver Qualification Standards

Every listed driver needs a Motor Vehicle Record (MVR) pulled within the last 30 days. Minimum 3 years licensed driving experience. No more than 2 moving violations in the trailing 3 years, and no at-fault accidents in the trailing 3 years for any driver operating a vehicle over 10,000 lbs GVW. A single DUI/DWI in the trailing 5 years disqualifies that driver from fleet coverage regardless of other factors.

Section 4.1 — Required Documentation at Bind

Current vehicle list with VINs, GVW class, and garaging address for each unit. Named-driver list with license numbers and hire dates. Three years of prior loss runs from the incumbent carrier (or a letter of no prior coverage). Signed application with the fleet's primary use description.

Section 4.3 — Loss History & Experience Rating

Accounts with a 3-year loss ratio under 40% qualify for the standard experience credit (up to 15% off base premium). A single at-fault loss over \$25,000 in the trailing 3 years moves the account to a schedule-rated review rather than standard rating.

Section 6.2 — Fees & Surcharges Schedule

Policy fee: \$150 flat per term. Fleet safety program enrollment (optional, 5% credit if completed within 60 days of binding): no additional fee. Late payment surcharge: \$35 after a 10-day grace period. Mid-term vehicle addition: prorated premium plus a \$25 processing fee per unit.

The prompt

CLAUDE PROMPT

I'm meeting tomorrow morning with a landscaping company that operates 8 commercial trucks and wants to bind commercial auto fleet coverage. I'm uploading our underwriting guide. Based only on this guide:

1. List the 5 most important requirements I need to verify before I can bind this policy for an 8-truck landscaping fleet.
2. In plain language, tell me what fees or surcharges I should be ready to explain to this client.
3. Draft a short, professional email I can send today asking the client to bring the required documents to tomorrow's meeting. Under 150 words.

Format your full response as a one-page summary I can save as a Word document.

Presenter notes: upload the excerpt (or your real guide), run this single prompt, then download and open the .docx on screen. Give it a beat of silence when the document opens — this is the strongest proof point in the entire class.

Demo 4 — Precision Marketing (Slide 39, NotebookLM)

Scenario: an 8-person boutique agency. Marcus starts Monday, and the agency's SOPs are scattered across five different places.

Source material — three SOP documents to upload

Upload all three as separate sources in the same NotebookLM notebook before class.

SOP 1 — NEW CLIENT ONBOARDING & BILLING

1. A signed contract triggers a welcome email within 1 business day, cc'ing the account lead.
2. New clients are billed via retainer, invoiced on the 1st of each month for the month ahead – not billed in arrears.
3. The first invoice is prorated to the contract start date and due within 15 days of signing, before any deliverable work begins.
4. Set up the client folder in the shared drive using the naming convention [ClientName]_[Year], and create a project in the project management tool before any work starts.
5. The account lead schedules a 30-minute kickoff call within the first week.

SOP 2 — CLIENT COMMUNICATION STANDARDS

1. All client-facing email goes out within 1 business day; urgent requests get a same-day acknowledgment even if the full answer takes longer.
2. Every account has one point of contact – routing questions through anyone else creates confusion and rework.
3. Status updates go out every Friday by 3pm for active projects, even if the update is "no change this week."
4. Never promise a deadline in a client email without confirming with the project lead first.

SOP 3 — PROJECT KICKOFF CHECKLIST

1. Confirm scope and deliverables match the signed contract before the kickoff call.
2. Assign a project lead and a secondary contact within the agency.
3. Build the project timeline in the shared tool and share it with the client within 3 business days of kickoff.
4. Flag any scope questions to the account lead before the kickoff call, not during it.

The question to ask live

NOTEBOOKLM QUESTION

How do we bill a new client?

This is answered directly by SOP 1, points 2 and 3 — the citation should link straight back to that passage. Click through to it on screen and say explicitly: "Notice it didn't just answer — it showed its work."

Audio Overview

Generate the Audio Overview from all three sources ahead of time so it's ready to play — this can take several minutes to render, don't do it live. Have about 20 seconds cued up to play. If running behind schedule, skip playing it and narrate the screenshot instead (saves roughly 6 minutes per the outline's flex-point note).

Demo 5 — Privacy Toggles (Slide 45)

Not a prompt — a live settings walkthrough. Verify both exact menu paths the morning of class, since menu locations move.

- Claude: Settings → Privacy → toggle "Help improve Claude" off.
- ChatGPT: Settings → Data Controls → toggle "Improve the model for everyone" off. Mention Temporary Chat as an option for one-off sensitive questions.

Appendix — Slide 29 Fallback Prompt ("Your Turn")

If there are no volunteers, or the class is running behind, walk through this prepared example yourself instead of waiting on the room. It uses the Context / Task / Constraints framework from Slide 23.

FALLBACK EXAMPLE — JOB POSTING

Context: I own an 8-person landscaping company and we're struggling to find reliable crew leads.

Task: Write a 250-word job posting for a Crew Lead position.

Constraints: Conversational, not corporate. Mention a \$500 signing bonus and a company truck. Avoid jargon like "fast-paced environment."

Applied Momentum — Internal presenter reference for AI Essentials for Business. Not for distribution to class attendees.