

THE COACHING WORKBOOK

Get more from your first AI coaching session



A small-business preparation workbook

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You do not need to arrive knowing the right AI terminology. Bring one task, a clear example of the result you want and the questions that have kept you from starting.

Use these worksheets before, during and after a coaching conversation. The exercises use public, invented or approved examples. Coaching scope and deliverables should be agreed before work starts.

FIELD NOTE 01

Describe your work in plain English



My business helps:

Our customers usually ask:

The task I keep putting off:

It happens approximately:

I currently complete it by:

The frustrating part is:

“I spend time turning approved service notes into follow-up drafts” is more useful than “I need AI.” Keep the description focused on the work, not a particular brand of tool.

FIELD NOTE 02

Bring the right examples

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Prepare one example input and one acceptable output. Invented samples are enough for a first session.

Bring	Leave out of an initial sample
A public service description	Passwords and API keys
An invented customer inquiry	Payment or identity details
An approved FAQ	Confidential customer records
A blank template	Information you lack permission to share

Before sharing business information, confirm the tool's data settings and your business's rules. Removing names does not necessarily remove identifying details.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION

FIELD NOTE 03

Define what good looks like



The output should be a:

It is intended for:

It must include:

It must not claim:

Its approximate length or format:

The person who can approve it:

Choose two or three concrete checks. For a customer email, those might be “answers the actual question,” “does not invent a price” and “gives the correct contact step.” A confident tone is not evidence that the answer is correct.

FIELD NOTE 04

Learn the workflow, not a magic prompt



A repeatable workflow includes more than the words typed into a chat box.

1. Prepare the approved input.
2. State the task and intended audience.
3. Describe the output and its limits.
4. Ask the tool to mark missing information.
5. Review against your quality checks.
6. Make corrections and save the useful version.

During coaching, ask to see why a prompt changed and how to recognize a poor result. Keep notes you can use without the coach sitting beside you.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION

FIELD NOTE 05

Practice with an invented inquiry

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Sample inquiry: “Our website looks dated and customers say they cannot find how to contact us. What should we do first?”

Draft a short reply using only these facts: our business offers website planning conversations; the next step is to discuss the customer's service pages and mobile contact experience. Do not quote prices, imply a booking or promise a launch date. Separate missing questions from the reply.

Review the output:

What was useful?

What did it invent or miss?

What did I change?

Which instruction would I keep?

FIELD NOTE 06

Make the process yours



Save a workflow note with these headings:

Task and trigger: when I use this workflow.

Approved inputs: where the material comes from and what stays out.

Instructions: the version of the prompt that worked.

Review checklist: facts, tone, commitments and next step.

Owner: who reviews and who maintains the instructions.

Stop condition: what requires a person with different expertise or a new scope.

Keep the instructions beside a checked example. Update them when the business's services or working practices change.

FIELD NOTE 07

Plan a follow-up you can evaluate



Try the workflow on a second approved example before connecting live systems.

Baseline task time:

Preparation and AI use time:

Review and correction time:

Did the output meet my checks?

Did the process repeat on a different example?

My next decision: keep / adjust / stop.

An early attempt may take longer because you are learning. That is useful information, not a reason to hide setup or review time from the comparison.

FIELD NOTE 08

Questions worth asking your coach

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

- Can we use an account I already have?
- What information can I put into this tool?
- How do I check the result?
- What happens when the tool cannot answer?
- What extra subscriptions or usage costs are involved?
- What is included in coaching, and what needs separate implementation?
- What will I be able to repeat on my own?

My three priority questions:

Bring these to your conversation with Chris Costa. Explore AI coaching:

<https://costaailabs.com/ai-coaching>

Request a conversation: <https://costaailabs.com/contact?service=ai-coaching>

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION
