

YOUR SEVEN-DAY KICKSTART

Your First Useful AI Workflow



A 7-Day Kickstart for Small Business Owners

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A practical workbook for choosing one recurring task, trying AI on approved information, and deciding whether the result is worth repeating.

You do not need a new software stack to start. You need a clear task, a small test and someone responsible for checking the result.

Inside: a task scorecard, reusable prompts, a seven-day plan and a worksheet you can bring to an AI coaching session.

Illustrative examples throughout. This guide makes no promise of time savings or business results.

FIELD NOTE 01

Choose a task before choosing a tool



Write down three tasks you repeat. Good candidates have a clear input, a clear output and a person who can review the result.

Examples: drafting a follow-up from approved notes; rewriting a public service description; turning an approved FAQ into a content outline.

For your first test, avoid decisions that automatically send messages, change prices, approve transactions or affect someone's rights. Start with a draft that a person reviews.

Fill in:

I repeat this task:

The input comes from:

A useful output looks like:

The reviewer is:

Choose one task to carry through the rest of this workbook.

FIELD NOTE 02

Use the opportunity scorecard

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Score each candidate from 1 to 3. Higher means a better fit for an initial, reviewed experiment.

Question	1	2	3
How often does it happen?	Occasionally	Monthly	Weekly or more
Are the inputs ready?	Scattered	Partly organized	Clear and accessible
Can you recognize a good result?	Hard to judge	Somewhat	Clear criteria
Can a person review before use?	No clear reviewer	Possible	Named reviewer

This is a discussion aid, not a prediction of return on investment. A high score does not override data restrictions or an unsuitable task.

My chosen task:

Why it is a useful first test:

FIELD NOTE 03

Decide what information is allowed



Before entering business information into an AI tool, check your business's policies, the account's data settings and whether you have permission to use the information there.

For the first experiment, use public information, invented examples or approved material with private details removed.

Do not include passwords, API keys, payment details or customer records just because a prompt asks for more context. Removing a name alone may not remove all identifying information.

Information I may use:

Information I must keep out:

Person who can resolve a question:

If you are unsure, stop the upload and ask the person responsible for the data. Keep the exercise small enough to test without sensitive information.

FIELD NOTE 04

A prompt you can reuse



Copy this structure and replace the brackets:

“Help me with [specific task] for [audience].

Use only the approved information below: [paste material].

Return [format, approximate length and tone].

Include [required points]. Do not include [things outside scope].

Do not invent prices, promises, results or facts. If information is missing, mark it as a question for me to answer.

Before the draft, list any missing details that would materially change the result.”

The prompt is a starting point, not a guarantee of accuracy. Save the version that works with your task and account, along with examples of acceptable output. Review each result before using it.

FIELD NOTE 05

Example: a customer follow-up draft

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Use an invented scenario for practice:

“Draft a friendly email under 120 words to a business owner who asked about updating a website. They want clearer services and easier mobile contact. Invite them to a planning conversation. Do not quote a price, imply they have booked, or promise a launch date. Mark any missing business details.”

Check the draft:

- Does it reflect the request?
- Did it invent a commitment?
- Is the next step clear?
- Would you actually send it in this voice?

Edit the result yourself. Do not connect automatic sending during this first test. When adapting to a real inquiry, use only information approved for the tool.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION

FIELD NOTE 06

Example: content from an approved FAQ



Start with a real question customers ask and an approved answer with no private information.

Prompt:

“Using this approved FAQ, create one 150-word LinkedIn draft and a five-point outline for a service explainer video. Preserve the meaning. Do not add claims, statistics or client examples. Finish with one clear invitation to discuss the service.”

Review facts, tone, links and the invitation. If the draft contains extra claims, remove them and revise the prompt.

A useful content workflow has both a production step and a review step. Publishing tools come after approval. Your business’s own details should drive the message, rather than a generic list of trends.

FIELD NOTE 07

Example: organize inquiries for review



Use three invented inquiries to test a simple output format.

Prompt:

“Organize these sample inquiries into a table: requested service, missing information, suggested next question, and review owner. Use ‘unknown’ where information is missing. Do not infer budgets, urgency or buying intent that the inquiry does not state.”

Compare the table to the original notes. Check that no inquiry is dropped or changed in meaning.

This is an organization exercise. A live dashboard or automated intake connection is a separate implementation project, with access controls, agreed data handling and end-to-end testing. You can learn whether the format helps before building that integration.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION

FIELD NOTE 08

Your seven-day experiment

1

INPUT
Use approved material

2

WORKFLOW
Define one useful task

3

REVIEW
Check the whole result

Day	Small action	Keep this record
1	Choose the task	Desired output and reviewer
2	Prepare approved sample inputs	What you may and may not use
3	Try the reusable prompt	First draft and missing questions
4	Review against your criteria	Corrections needed
5	Test another approved sample	Whether the approach repeats
6	Write the repeatable steps	Prompt, input rules and review checklist
7	Decide: keep, adjust or stop	Reason for the decision

Use this as a flexible plan, not a requirement to finish in a week. Tool access or unresolved data questions may need more time.

FIELD NOTE 09

Measure the whole workflow



Compare like-for-like examples. Include preparation, prompting, checking and corrections in the AI-assisted time; do not count only the generation step.

Baseline task time:

AI-assisted task time, including review:

Corrections required:

Result quality:

Would I use the result again?

Record what made the comparison unfair, such as a simpler example or cleaner inputs. The first attempt may take longer because you are learning and setting up the process.

Keep the workflow only if it meets your quality standards and fits your business. A result that arrives quickly but needs extensive correction may be the wrong approach.

FIELD NOTE 10

Bring this worksheet to coaching



My business and audience:

The recurring task I chose:

The accounts or tools I already use:

Approved input examples I can share:

Information that must stay out:

The result I want:

The person who reviews it:

What went wrong in my test:

What I want to learn next:

Bring examples only if you have permission to share them. Public or invented samples are fine for an initial conversation.

A useful coaching session works on your actual task, explains the choices and leaves you with steps you can repeat. Implementation and ongoing operation need their own agreed scope.

YOUR NEXT STEP

Ready to make AI useful in your business?

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Costa AI Labs offers practical AI coaching and consulting with Chris Costa, in person or over Zoom.

The AI Business Kickstart combines discovery, setup and practice, and follow-up. The aim is to identify priorities, practice a repeatable workflow and leave with a short action plan.

Coaching helps you learn and use the workflow. Consulting helps define priorities and scope. Dashboards, integrations and custom software are quoted as separate implementation work when needed.

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

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

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Your next step: bring one task and one question.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION
