

THE PRACTICAL FIELD GUIDE

What AI can actually do for your business today



A practical field guide for small-business owners

By Chris Costa · Costa AI Labs

Start with work you already recognize: a customer question, an explanation of a service, a meeting that needs a follow-up. This guide shows where AI can support that work, what a useful first version looks like and what still needs your judgment.

The examples are illustrative. They are not customer results or promises of savings. You do not need to buy a collection of apps before trying one task.

FIELD NOTE 01

Think in tasks, not tool names



A useful starting point has an input, an output and a reviewer.

Input: an approved service description.

Output: a draft answer to a common customer question.

Reviewer: someone who knows what the business actually offers.

AI is often useful for producing a first version, organizing information or offering alternatives. A finished workflow also needs a reliable source, a decision about what information may be used and a way to check the output.

Try completing this sentence: “When ____ arrives, I need to turn it into ____, and ____ checks it.”
If you cannot describe the task, simplify it before selecting software.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION

FIELD NOTE 02

Draft customer responses

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Useful first version: turn an approved answer and a short inquiry into a response for a person to review.

Example prompt:

Draft a friendly response to this invented customer inquiry. Use only the approved service notes below. Keep it under 120 words. Include one next step. Do not invent prices, availability, guarantees or booking confirmations. List missing details separately.

Check the customer's question, the service details, tone and next step. Keep automatic sending off during the initial test. If responses need customer records or live availability, that adds data access and integration work beyond a writing prompt.

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FIELD NOTE 03

Turn your knowledge into content



Useful first version: adapt one approved FAQ into a social draft, an article outline or a short video script.

Example prompt:

Using this approved FAQ, draft a five-slide educational carousel for small-business owners. Give each slide one point and a short example. Preserve the meaning. Do not add statistics, customer stories or claims we have not supplied. End with a question rather than a sales promise.

Your expertise is the source. Check accuracy, current offers, links and voice before publication. Generated images can illustrate an idea; real project photographs and authentic demonstrations show work that a generated visual cannot prove.

FIELD NOTE 04

Make notes easier to act on



Useful first version: organize approved notes into decisions, tasks and open questions.

Organize these sample meeting notes into three sections: decisions explicitly recorded, actions with named owners and dates, and unresolved questions. Use “not specified” where an owner or date is missing. Do not assign work or infer agreement.

Compare the result with the original notes before sharing. Recording, transcribing and uploading a real meeting require the appropriate permissions and account settings. For your first exercise, use invented notes instead of confidential conversations.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION

FIELD NOTE 05

Organize inquiries and routine information

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Useful first version: turn invented requests into a table with requested service, missing details and a suggested next question.

Ask AI to preserve the requester's meaning and mark unknown information. Do not ask it to guess budgets, urgency or intent from a person's writing style.

A table can help you test a process before you build a dashboard. A live workflow that reads email, updates records or sends follow-ups needs scoped access, ownership and testing. A prompt demonstration is not a working integration.

YOUR BUSINESS / A NOTE TO BRING TO THE CONVERSATION

FIELD NOTE 06

Plan images, video and website improvements



AI can help draft a storyboard, compare headline options, outline a service page or create concept imagery. Give it a clear audience, an approved offer and one action the viewer should take.

For a short service video, prepare:

- The customer question it answers.
- A factual explanation of the service.
- Real footage or approved illustrative assets.
- A caption and spoken script for review.
- A final URL or contact step you have tested.

Keep invented visuals separate from evidence of real customers or completed projects. Obtain appropriate permission for a person's image or voice, and use music and footage you have rights to publish.

FIELD NOTE 07

Know when a prompt is not enough



Need	Sensible starting point
Better drafts or clearer summaries	Guided practice with an existing tool
Decide which process to improve	A consulting discovery and scope exercise
Connect systems or update live records	An implementation project
Ongoing review and operation	A named owner and maintenance plan

AI output can be wrong, incomplete or unsupported. Important decisions need the right human expertise. A tool should not quietly gain permission to spend money, send commitments or change access because it performed well on a sample.

FIELD NOTE 08

Choose one experiment

1

INPUT

Use approved material

2

WORKFLOW

Define one useful task

3

REVIEW

Check the whole result

Write down:

1. The recurring task:

2. Approved input I can use:

3. The result I want:

4. Who checks it:

5. What must never be invented:

6. Existing accounts I can try first:

7. What would make me stop:

Compare the whole task: preparation, generation, review and corrections. Record result quality alongside time. Decide whether to keep, change or stop the workflow before expanding it.

YOUR NEXT STEP

Bring one task. Leave with a clearer next step.



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

Coaching helps you learn and repeat a workflow. Consulting helps choose priorities and define scope. Custom tools, dashboards and integrations are separate implementation projects when needed.

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

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

For a hands-on follow-up, use our companion workbook, **Your First Useful AI Workflow**.

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