

• SINCE 1994

# Practical AI *for small business.*

REAL WORKFLOWS. REAL TOOLS. THIS WEEK.

If you can *describe* the  
task,

AI can do the first  
draft.

The skill is not "prompt engineering."

It is *describing what you want* clearly enough that a  
stranger could do it.

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That stranger is now in every tool you already pay for

# *Who this is for, and what you'll leave with.*

## WHO THIS IS FOR

The owner, operator, or founder doing every job. No engineering team. No prompt engineer on staff. A laptop and an account at one or two of these tools.

## WHAT WE'LL SKIP

Theory. Hype. Vendor pitches. Any sentence containing the word "agentic."

## WHAT YOU'LL LEAVE WITH

- **Five workflows** you can run this week, with the exact prompt pattern for each
- A **two-minute "verify" habit** that catches 90 percent of bad AI output
- A **straight answer** on which tools are worth paying for and which are not, today

# The *four tools* that matter for a small business today.

TOOL	WHAT IT'S BEST AT	FREE TIER?	WHEN YOU'D PAY
<b>Claude</b> (Anthropic)	Long documents, careful writing, <b>Artifacts</b> preview side panel, <b>Projects</b> for shared context	Yes, limited	\$20 / mo personal, more for Teams. Pay when you want longer context + Artifacts on every chat.
<b>ChatGPT</b> (OpenAI)	Voice, image, <b>Data Analysis</b> with file upload, custom GPTs, broadest app integration	Yes, limited	\$20 / mo Plus. Pay for voice + file upload + GPT-5.
<b>Gemini</b> (Google)	Lives <b>inside Google Workspace</b> , Sheets, Docs, Gmail. Long context.	Yes, limited	\$20 / mo Workspace add-on. Pay when most of your work is in Google.
<b>Microsoft Copilot</b>	Lives <b>inside Office 365</b> , Excel, Word, Outlook, Teams.	Limited	\$30 / mo per user. Pay when most of your work is in Office.

You don't need all four. **Pick the one that lives in the software you already use**, then add one more for the gaps.

WHAT'S ACTUALLY NEW THIS YEAR

# Side-panel *Artifacts*. Shared *Projects*.

You can now hand AI a half-finished spreadsheet, a draft contract, or a campaign plan.

It edits the file *in a preview pane next to the chat*, you can see changes in real time.

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That single shift is what makes the **"AI does the first draft"** workflow finally usable for non-developers.

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# *The spreadsheet rescue.*

You exported a CSV from your **bank, CRM, or POS**.  
It is a mess. *You need it clean by 5 PM.*

# Drop the file in. Describe what good looks like.

## THE PROMPT PATTERN

"Here is a CSV from {source}. **Clean it up:**

- Dedupe rows on {column}
- Convert dates in the {column} column to ISO format
- Title-case all customer names
- Add a column that sums {X} by {Y}
- Give me back as an Excel file I can download

Then explain in two sentences what you changed and where you guessed."

## WHAT GOOD LOOKS LIKE

**Tool to use:** Claude Artifacts, or ChatGPT Data Analysis. Both can preview and let you download the file.

**Time:** about three minutes for a 2,000-row file.

**Verify:** spot-check **three random rows** against the original. If those three are right, the rest almost always are. If any one is wrong, push back on that specific row.

# *The email drafter.*

You have **forty unread emails** and three of them need a thoughtful reply.

*You have twenty minutes.*

# Paste their email. Tell it your situation.

## THE PROMPT PATTERN

"Here is an email I just received: **{paste it}**

Background you need:

- I am {role} at {company}
- This person is {who they are to you}
- The history is {one sentence}

Draft three replies, **30 to 60 words each**:

- 01 Warm yes
- 02 Soft no
- 03 Buy myself a week

Match the tone of how they wrote to me."

## WHAT GOOD LOOKS LIKE

**Tool to use:** Claude, ChatGPT, or the Copilot / Gemini sidebar inside your inbox.

**Time:** about ninety seconds per email.

**Verify:** read every word **out loud** before sending. AI drafts are smoother than your real voice. The read-aloud test is the cheapest way to catch the line that does not sound like you.

# *The voice-memo SOP.*

You have a **five-step process** in your head you have been meaning to document for six months.

*You have a phone and a fifteen-minute drive.*

# Talk it out. Let AI clean it up.

## THE PROMPT PATTERN

"Here is a transcript of me **walking through how we {do the thing}**: {paste transcript}

Turn it into a written SOP. Format:

- 01 One-paragraph **intro**: when to use this, who runs it
- 02 **Numbered steps**, each with one sentence of why
- 03 **Common mistakes** section, three to five items
- 04 A '**when in doubt**' line at the bottom

Keep my voice. Don't make up details I didn't say."

## WHAT GOOD LOOKS LIKE

**Tools you need:** any phone voice memo app + any AI tool that takes long text input. Otter, Granola, or Apple's built-in transcribe work.

**Time:** fifteen-minute drive + five minutes of cleanup.

**Verify:** read it as if you were handing it to a **new hire on day one**. If a step is unclear, you skipped a beat on the drive. Re-record just that step and re-run the prompt with the addition.

WORKFLOW 4 OF 5

# *The bulk FAQ writer.*

Customers ask the **same twenty questions**.  
You have written down *none of them*.

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# Brainstorm with you. Then write all twenty.

## THE PROMPT PATTERN, TWO PASSES

### Pass 1:

"I run a {business type} that {serves who} doing {what}. List the **twenty questions a new customer most commonly asks**, ranked by frequency. Be specific to my business, not generic."

*Edit the list. Add three you know are real. Remove two you don't get asked.*

### Pass 2:

"For each of these questions, write a **2 to 3 sentence answer**. Tone: {your voice}. Where you'd need a specific number or policy, leave it as [BRACKETED]. I'll fill it in."

## WHAT GOOD LOOKS LIKE

**Tool to use:** Claude or ChatGPT.

**Time:** ninety minutes including the bracket-filling pass.

**Verify:** never publish the bracketed placeholders. **Search the doc for [ ] before you post it anywhere.** That one habit prevents 100 percent of the "we forgot to fill in the discount code" disasters.

# *The meeting actions.*

You just got off a **forty-five minute call** with three decisions and five action items.

*Nobody took notes.*

# Transcript in. Decisions, actions, and follow-ups out.

## THE PROMPT PATTERN

"Here is a transcript of a **{call type}** with {who}: {paste}"

Extract:

- 01 **Decisions made** (what, by whom)
- 02 **Action items**, each with: owner, deadline if mentioned, status
- 03 **Open questions** we didn't resolve
- 04 **Follow-ups for next time**

Mark anything where the owner or deadline is **ambiguous** so I can confirm with attendees."

## WHAT GOOD LOOKS LIKE

**Tools to use:** any meeting recorder (Otter, Granola, Fathom, Zoom built-in) → paste into Claude or ChatGPT. Or use a tool like Granola that does both.

**Time:** thirty seconds after the call ends.

**Verify:** send the action-items list back to attendees within one hour. **"Here's what I heard, push back if I got it wrong."** The half-life of a misremembered action item is about two days.

LAB · ~20 MINUTES, HANDS-ON

# *Pick one. Ship it now.*

Open the tool you already pay for.

Pick the workflow that solves a real problem on your plate  
**this week.**

Run the prompt pattern from the slide.

**Come back with the output and the verify step you did.**

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# *What did you build?*

## SHARE

- Which workflow did you pick?
- What was the prompt you actually used?
- What surprised you about the output?
- What did you change before you used it?
- Where did the AI miss?

## PATTERNS WE USUALLY SEE

- **Pass 1 is rarely the final draft.** It is the structure. The voice comes from your edits in pass 2.
- **The verify step finds the same five mistakes** every time: wrong names, wrong numbers, made-up policies, overconfident tone, and missing context.
- **The win is not "the AI did it."** The win is "I did it in twenty minutes instead of two hours."

# Five mistakes. *All preventable.*

#	MISTAKE	WHAT TO DO INSTEAD
1	<b>Trusting a confident answer.</b> AI sounds sure even when it isn't.	Ask for sources. Ask it to flag where it guessed. Spot-check three details.
2	<b>Pasting private data into a free account.</b> Free tools may train on what you paste.	Use paid business plans for anything customer, financial, or legal. Or scrub before paste.
3	<b>Skipping the verify step "just this once."</b>	The "just this once" is the email that goes out wrong. Verify is the workflow, not extra.
4	<b>Defaulting to the biggest, most expensive model for every task.</b>	Cheap tier first. Only upgrade when the cheap tier visibly fails on your task.
5	<b>One giant prompt instead of two clean passes.</b>	Brainstorm pass → edit → execute pass. Two prompts beat one every time.

If you only remember **one** of these tonight, make it **#3**. *Verify is the workflow.*

# 2-min

THE VERIFY HABIT YOU NEED TO  
BUILD INTO EVERY WORKFLOW.  
FASTER THAN RE-DOING THE  
TASK. CHEAPER THAN  
APOLOGIZING FOR THE BAD  
OUTPUT.

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# When the *free tier* is enough. When it isn't.

YOU'RE USING AI FOR...	FREE IS ENOUGH	PAY \$20 / MO FOR	PAY \$30+ / MO FOR
Drafting emails, summaries, short docs	✓ Almost always	Higher message limits, voice mode, file upload	—
Working with files (Excel, PDFs, CSVs)	Limited	✓ ChatGPT Plus / Claude Pro	—
Workflows inside Google or Office apps	Demo-only	—	✓ Gemini Workspace add-on / Copilot for 365
Long documents, careful writing, big context windows	Limited	✓ Claude Pro (Artifacts + Projects)	—
Anything customer-facing in production	No	No	Custom GPTs / Claude Projects + a human review step

A workable monthly budget for a solo founder: **\$20 to \$50 / month total**, across one personal subscription + one workspace add-on. *Set a spend cap on day one.*

# *Five workflows. Five weeks.*

Don't try to do all five at once. **One per week.** Build the muscle.

- 01 **Week 1:** The email drafter. Use it on the next five emails that need a thoughtful reply.
- 02 **Week 2:** The voice-memo SOP. Pick one process. Talk it through on a drive. Clean it up.
- 03 **Week 3:** The spreadsheet rescue. Next time you get a messy export, run it through Artifacts.
- 04 **Week 4:** The bulk FAQ writer. Two-pass. Edit between. Post the results to your website or help desk.
- 05 **Week 5:** The meeting actions. Start recording one meeting a week. Send the action list within an hour.

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At the end of five weeks: you have **five working workflows**, you know which AI tool you actually prefer, and you've built the **verify habit** that protects you from the rest.

KEEP GOING

# *Resources we built for you.*

## HANDS-ON LABS

- **Compare 13 AI models side by side** · [rexblack.com/labs/compare-models](https://rexblack.com/labs/compare-models)
- **What is an AI agent?** · [rexblack.com/labs/agent-anatomy](https://rexblack.com/labs/agent-anatomy)

## RELATED TALKS

- **AI tool selection for small business** · [rexblack.com/resources/talks/strive-may-2026](https://rexblack.com/resources/talks/strive-may-2026)
- **The six flaws of AI that never go away** · [rexblack.com/resources/talks/strive-apr-2026](https://rexblack.com/resources/talks/strive-apr-2026)

## DEEPER READING

- **Choosing the right model (and knowing when to switch)** · [rexblack.com/resources/writing/ai-model-selection-framework](https://rexblack.com/resources/writing/ai-model-selection-framework)
- **Workflow or agent?** · [rexblack.com/resources/writing/workflow-or-agent](https://rexblack.com/resources/writing/workflow-or-agent)
- **Evaluation before shipping** · [rexblack.com/resources/writing/ai-evaluation-before-shipping](https://rexblack.com/resources/writing/ai-evaluation-before-shipping)

## PRODUCTION EXAMPLES

- **AI-powered intake at scale** · [rexblack.com/case-studies/ai-veteran-intake](https://rexblack.com/case-studies/ai-veteran-intake)

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# Thank you.

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