APPLIED AI FOR BUSINESS OWNERS

Put It on the Payroll

A live, work-alongside workshop: AI outside your walls, then inside them

Scan now: the prompt sheet

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VIBEMODE:ON

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Scan: prompt sheet

WHY LISTEN TO ME

Everything today runs my business right now

A regulated industry

I run a wealth management practice. Every system you will see survives compliance review. If it survives compliance, it survives your business.

Sixteen months

My first prompt was a Google search. Sixteen months later, AI sits inside the core of how we manage money: daily reports, research, proposals, the inbox.

Built, not bought

Everything on these slides was built by prompting, not programming. I do not write code. The AI does. I bring the judgment.

HOW THIS WORKS

Four beats, two halves of your business

1 · SLIDE

The idea, in one minute

2 · WATCH ME

I run it live on the big screen

3 · YOUR TURN

You run yours, phone or laptop

4 · SHARE

Tap Share in your AI, drop the link, best ones go on screen

PART I · OUTSIDE YOUR WALLS

Where customers see you: social, print, email campaigns, thought leadership, listening to the market.

PART II · INSIDE YOUR WALLS

Where they never look: reports, email, meetings, cost control, the software you rent, the work you hire out.

Prompt sheet

Phones are fine. Tap Copy on the sheet, fill in the [BRACKETS], paste into your AI. Gemini, Claude, ChatGPT all work.

THE RESTAURANT RULE

Two sides of the house



RED BOARD · DETERMINISTIC · CODE

- Data, math, one right answer
- Same input, same output, every time
- Payroll math, inventory counts, the database

GREEN BOARD · PROBABILISTIC · LLM

- Language, judgment, a good answer
- Drafting, rewriting, brainstorming
- The side you will live on as an owner

You never cut vegetables on the raw-meat board. The skill of this decade is knowing which board the task belongs on.

PROMPTING BASICS

Four parts, every time

1

ROLE

Who the AI should be

“You are a social media manager…”

2

CONTEXT

What it needs to know

“My business sells X to Y…”

3

TASK

Exactly what to produce

“Create a 2-week posting plan…”

4

FORMAT

What the output looks like

“As a table I can print…”

Iteration beats perfection. Talk to it like a smart new hire. The free Google Prompting Essentials course on Coursera flipped the switch for me: a few hours, no cost.

Free course

YOUR TURN · PROMPT 1 · 2 MINUTES

Your first build: the warm-up

PROMPT 1 · TAP COPY ON THE SHEET

```
You are a business analyst. My business is [ONE SENTENCE: what you sell and to whom]. List three tasks OUTSIDE my business (customers see it: marketing, outreach, reviews, sales) and three tasks INSIDE my business (customers never see it: admin, reports, scheduling, email, tools) that AI could take over this month, and the two tasks I should never hand to AI. Be specific to my industry.
```

SHAWARMA RESTAURANT

Outside: review replies, catering menu. Inside: food-cost report, staff schedule.

HVAC COMPANY

Outside: maintenance-plan reminders. Inside: quotes from tech notes, callback log.

DENTAL PRACTICE

Outside: recall texts, new-patient FAQ. Inside: claim follow-ups, schedule gaps.

SHARE What did AI tell you NOT to automate? And look at the labels: OUTSIDE and INSIDE are the map for the rest of the hour.

THE BIGGEST UNLOCK FOR NON-PROGRAMMERS

Prompting to write the prompts

I did not write the prompt that writes my research reports. I asked the AI to write it.

1 Ask for the perfect instructions

"Write me the best possible prompt for an institutional-grade research report. Ask me three questions first."

2 Save what comes back as a file

Mine came back seventeen pages long. I never retype it.

3 Reuse it forever

"Do this for SpaceX. Do this for Palantir." A thirty-five-page report comes back.

WATCH ME I ask for the perfect research-report prompt, live, and let it stream.
YOUR TURN Prompt 2 on the sheet: it asks you three questions, then writes your prompt. Next slide: big jobs worth doing this way.

PICK YOURS · STEP 1 WRITES THE MASTER PROMPT, STEP 2 RUNS IT

Big jobs worth a prompt that writes the prompt

Restaurant

Menu engineering from your POS export: which dishes make money, what to reprice, cut, or promote.

HVAC & trades

A quoting playbook and price book, so every tech quotes the same job the same way.

Dental & clinics

A patient recall and reactivation program: who is overdue, what to send, when.

Insurance agency

A renewal-season retention system: who is at risk, the outreach, the scripts.

Grocery & delivery

A 52-week promotions calendar around Ramadan, both Eids, Hajj, back-to-school, the holidays.

Sweets & bakery

A corporate and wedding gifting catalog, plus the outreach to office managers and planners.

CPA & bookkeeping

A new-client onboarding kit and a year-end planning checklist for each client type.

Realtor

A monthly neighborhood market report your past clients actually open.

Step 1, Prompt 2 on the sheet: “I want an AI to [THE BIG JOB]. Ask me three questions first, then write me the best possible prompt for it.”

The house rule

Nothing an AI makes ships until it has been iterated three times.

- Work products and meetings alike: the proposal, the post, the email, the minutes, the agenda, the follow-up.

You review. You sign. You own it.

PART I · AI OUTSIDE YOUR ORGANIZATION

Outside the walls

How customers find you, hear from you, and come to trust you.



Attract

Social media, print, the window poster



Nurture

Email drip campaigns, newsletters



Convince

Thought leadership, proposals



Listen

Reviews, competitors, the market

The strategy is always yours: what business am I in, what is my value proposition, why do customers come to me. Answer those and the AI executes.

LIVE BUILD A · WATCH ME, THEN YOUR TURN

The sweets shop sells desire



A sweets shop does not sell dessert. It sells celebration, generosity, and the taste of home. So we aim at Instagram.

WATCH ME A full Instagram package for Aker Sweets, a Palestinian kunafa house (since 1946 in Nablus): a 5-slide carousel for fall weddings and holiday gifting, three captions, and a 2-week posting calendar.

YOUR TURN · PROMPT A ON THE SHEET

```
You are a social media manager for my business: [WHAT YOU SELL AND TO WHOM]. My customers really buy [THE FEELING OR OUTCOME: trust, convenience, celebration, peace of mind]. Create a 5-post social media plan for the next two weeks that sells that feeling, not just the product. For each post: the text, the image idea, and the best day to post it.
```

Then we share one.

LIVE BUILD B · WATCH ME, THEN YOUR TURN

The grocer sells value and ritual

A grocery sells weekly comfort: value and convenience. Even a delivery app can put something physical in the customer's hands.

WATCH ME A weekly value flyer for Dukkan (halal grocery delivery across Tampa Bay) that rides in every delivery bag: old-country Arabic circular style, bold prices, headers in Arabic, a recipe from the sale items, and a scan-to-reorder panel.

YOUR TURN · PROMPT B ON THE SHEET

```
You are a marketing designer for my business: [WHAT YOU SELL AND TO WHOM]. My customers come to me for [VALUE / CONVENIENCE / EXPERTISE / SPEED]. Create one piece of old-school, physical-world marketing (a mailer, flyer, counter card, bag insert, or window poster) that my customers would actually keep. Describe the layout section by section and write all the copy.
```

Then we share one.

LIVE BUILD C · WATCH ME, THEN YOUR TURN

The CPA sells authority, then nurtures

Professional services sell authority, and authority today is thought leadership. A guide nobody follows up on is a guide nobody reads. So we publish, then we drip.

WATCH ME For a Tampa CPA firm serving restaurants, contractors, and retailers: a one-page guide on the new tips and overtime deductions, a 3-email drip that delivers it, and a LinkedIn teaser. Verification is written into the prompt.

YOUR TURN · PROMPT C ON THE SHEET

```
You are an expert in my field writing under my name. My business is [WHAT YOU DO]. Clients constantly ask me about [A QUESTION YOU ANSWER EVERY WEEK]. Write (1) a one-page guide answering it in plain English with three practical takeaways and one mistake to avoid, and (2) a 3-email drip sequence that delivers that guide to a new contact over two weeks: subject lines, short bodies, one call to action each. I will fact-check before sending.
```

Then we share one.

QUICK WATCH ME · OUTSIDE ANALYTICS

Listen to the market: reviews in, strategy out

Outside analytics used to mean a consultant. Now it means copy and paste.

WHAT I PASTE (10 reviews, invented for the demo)

★★★★★ "Best halal meat in the area… parking lot is tiny and always full on Fridays."

★★ "Checkout line was 25 minutes on Saturday. Only one register open."

★ "Called twice to ask if they had an item. Nobody picked up."

★★★ "Produce looks tired by afternoon. No online ordering in 2026?"

WHAT COMES BACK

Praise: the butcher counter, authentic staples, warm service.

Complaints: parking, one register at peak, produce fades by afternoon.

The gap you can own: a reliable, predictable trip.

Tomorrow's website line: *"Text us before you come: we will tell you what is fresh and have your butcher order ready."*

Homework, Prompt D: copy 5 to 10 Google reviews of your business or a competitor's from your phone and run the same prompt tonight.

PART I RECAP · WHAT I DO FOR MY OWN PRODUCTS

No agency required

A brand system, generated

Voice guide, palette, accessible colors, social templates. The brand bible tells every future AI session how to sound like us.

A site with its own drip

QuantGPT: landing page, waitlist, and a three-part email campaign, built and sent without an agency or an email vendor.



Logos and merch, under $1 each

Fourteen logo concepts and a merch line, every job run through a three-pass critique: generate, inspect, regenerate.





Three businesses, three value propositions, one tool. The strategy was human every time. What I do for my own products is exactly what you just did for yours.

PART II · AI INSIDE YOUR ORGANIZATION

Inside the walls

Cost control, automation, and building the tools you used to rent.

Reports that write themselves
The numbers nobody wants to build

Email that handles itself
The bouncer, in your voice

Vendors you stop paying
Rebuild what you rent

Work you don't hire out
Quotes, research, your own data

Agents that act
Prep, follow up, chase, reorder

The strategy is always yours: what business am I in, what is my value proposition, why do customers come to me. Answer those and the AI executes.

CASE · REPORTS THAT WRITE THEMSELVES

The report nobody wants to build

- Every business has one: the weekly numbers someone assembles by hand. Sales by day, jobs closed, deliveries, what is owed. Late, sometimes wrong, always stale.
- Describe it once: where the numbers live, what matters, what it should look like. The AI writes the steps and the code. A schedule runs it.
- Mine used to be a weekly email a staffer built by hand. Now a daily brief lands in my inbox at nine, with live numbers and only the news that touches our clients.



LESSON *Pick the boring, repetitive report your team dreads every week. That is the first thing you automate.*

CASE · VENDORS YOU STOP PAYING

The subscription I rebuilt

- I paid for a professional charting product for years. I used six of its features.
- I described those six, one by one, and had AI rebuild them on free public data. It is a program I double-click on my desktop.
- Every business rents software it half uses: the POS add-on, the scheduling app, the quoting tool, the review service.



LESSON *Before you renew anything, ask AI what it would take to build the part you actually use.*

CASE · THREE IN ONE

Work you don't hire out

The quote & proposal generator

Notes from a walkthrough or a call go in. A finished, branded quote comes out: the contractor estimate, the catering order, the engagement letter. Every number traces to your price sheet, and a human confirms it before it goes out.

Mine: statements and meeting notes in, a proposal deck out.

Research on demand

A new location, a supplier, a competitor, a new market. One saved master prompt turns out a thirty-page report on any of them, overnight.

Mine: the seventeen-page research brief.

Your data, finally answered

Export your POS, QuickBooks, or scheduling data and ask questions in plain English. The AI writes the analysis on the red board, step by step.

Mine: a 99-million-row market database, no data-science background.

LESSON *AI drafts, humans decide. I told our board we may never need to hire an entry-level analyst again. The checkpoint on the numbers is the job now.*

CASE · AGENTS THAT ACT

The agent that preps every meeting

An agent does not just answer. It runs on a schedule, uses your tools, and hands you finished work to approve.



Every evening

Reads tomorrow's calendar



Pulls the history

Last visit, open items, what they bought, what they owe



Drafts the brief

One page per meeting, plus the agenda and the follow-up email



You approve

Nothing sends without you. Then it logs the notes and sets the next touch

In my practice: before every client review it pulls the household's accounts, last meeting notes, upcoming birthdays and required distributions, and flags drift from the target plan. I walk in prepared.

Same pattern: the collections agent, the reorder agent, the review-reply agent.

LESSON *Agents act, so the safety rules stop being optional: read-only access first, a human approves every send, and keys live in a locked .env file, never in a chat.*

THE MENU · PICK ONE FOR THIS WEEK

More jobs AI does inside any business

Meeting minutes

Record, transcribe, get minutes, decisions, and every follow-up drafted.

SOPs & training

Talk through a task once; get the checklist and the new-hire manual.

Hiring

Job posts, screening questions, interview scorecards, offer letters.

Books cleanup

Categorize transactions, flag duplicates and odd charges, for your CPA to confirm.

Contracts in English

Leases and vendor contracts summarized, red flags listed, before your lawyer reads them.

Inventory & reorders

Sales history in, a reorder list and a slow-mover list out.

After-hours replies

Answer the same ten questions at 11 p.m.: hours, menu, pricing, booking.

Review replies

Every Google review answered in your voice, for you to approve in one tap.

Every one of these starts the same way: Prompt 2 on the sheet. Ask the AI to write the prompt for the job.

LIVE BUILD E · WATCH ME, THEN YOUR TURN

The vendor audit

Let us do the rebuild-it move for your business, right now. What are you paying for that AI could do?

WATCH ME My list, pasted from a note: a research terminal at $2,000/mo, a social agency at $1,500/mo, $400 per proposal deck, a weekly email that eats 3 staff hours, plus charting, CRM add-on, answering service, e-signature, website. Ranked by money saved per hour of my effort.

YOUR TURN · PROMPT E ON THE SHEET

```
You are a cost-control consultant. Here is what my business pays for every month: [LIST EACH TOOL,
SUBSCRIPTION, OR OUTSOURCED SERVICE WITH ITS MONTHLY COST]. For each one: what it actually does for me,
whether AI plus a simple tool could replace it today, and the honest first step to find out. Rank them by
money saved per hour of my effort.
```

Then we share one.

LOOP E · THE VENDOR AUDIT, RANKED (ILLUSTRATIVE FIGURES)

What the answer looks like

Rank	Line item	Annual cost	AI replace it?	First step	Saved per hour of my effort
1	**Weekly performance email**	$7,800 staff time	Yes	Automate it from a data export; staff reviews in 30 minutes	$1,625
2	**Freelance proposal designer**	$14,400	Yes	One AI proposal template; an hour of review per proposal	$1,575
3	**Research terminal**	$24,000	Partly	List the five features you use; price a cheaper feed plus AI	$1,500
4	**Social media agency**	$18,000	Partly	Draft four weeks in-house with AI; compliance still reviews	$1,280
5	**CRM add-on**	$1,440	Partly	Check if the base CRM plus AI already makes those reports	$720

LESSON *About $54,940 a year back for roughly 62 hours of setup. Start with the email: four hours of work, and it proves the habit. AI drafts, a human reviews, compliance approves.*

Figures are illustrative, from the demo list. Full answer: output/demo-data/sample-answer-vendor-audit.md

LIVE BUILD F · WATCH ME, THEN YOUR TURN

The email bouncer

Most of my inbox is the same six questions. The bouncer decides what gets in and drafts the rest in my voice.

WATCH ME The six questions I get every week: T-bills, Roth conversions, the kids' holdings, where is the VTI, a distribution, the SEP limit. Which need me, which get a template, which get a rule.

YOUR TURN · PROMPT F ON THE SHEET

```
You are my executive assistant. Here are the five kinds of emails I answer every week: [LIST THEM]. For each: decide whether it needs me, a template, or a rule. Write the templates in my voice: [TWO WORDS, e.g. warm and brief]. Then write the one-line rule for deciding what reaches my inbox. I have removed all names and account details.
```

Then we share one.

LOOP F · THE VOICE GUIDE

How it learned to write like me

I gave it a stack of my own emails, names removed, and asked: write the rules of how I write. This is what came back. It now sits at the top of every drafting prompt.

Verdict first, reasoning after. "Short version: I would not do this."

Plain, direct, warm. A smart friend across a desk, not a firm producing a memo.

Short paragraphs. One or two sentences, then a blank line.

Specific, casual numbers. "40K a year." "3 to 4% ish."

Casual disclaimers, not boilerplate. "As always, not an attorney, just giving you background."

Never. No "I hope this email finds you well." No stacked pleasantries. No em dashes.

Sign-off. Just "Brett," on its own line.

Homework, Prompt H: paste five of your own emails and get your voice guide.

The payroll

PART II RECAP · WHO DOES THE JOB NOW

The job	Who used to do it	What does it now
Weekly numbers report	A staffer, three hours a week	The daily brief, every morning
Charting software	A subscription	My own app, on my desktop
Proposal decks	An analyst or a freelancer	The generator, human-checked
Company research	An analyst, a week	A saved seventeen-page prompt
Inbox triage	Me, every evening	The bouncer, in my voice
Community moderation	A part-timer	A bot that runs daily, unattended
Meeting prep	Me, the night before	The prep agent (building it now)

Every one of those started with one prompt and three iterations. None of them were bought.

AND WE ARE BACK · GUARDRAILS

The rules that keep you safe

Iterate 3× before anything ships

Work products and meetings alike. First drafts waste everyone's time. Third drafts are work product.

Strip sensitive data

No names or account numbers in a prompt. Headless data: the AI works on the de-identified part. Ask vendors about zero data retention.

Every number traces to a source

AI drafts; it does not remember your figures. Numbers come from your real data, never from memory or estimation.

Keys in the .env file, never in chat

The key rack by the kitchen door, not taped to the front of the restaurant.

You sign it, you own it

AI is a brilliant first-drafter and an unreliable fact-checker. Build the review step into the workflow itself.

The 7-Day Challenge

1. **Tonight** Write your value proposition in one sentence. Run Prompt A, B, or C against it.
2. **This week** Run the vendor audit (E) and the email bouncer (F). Both are yours to keep.
3. **By Friday** Ship one thing. Post it, print it, or send it.

You do not bring the technical skill. The model does. You bring the judgment about your own business.

Let's go wibe code

Build it together. A room full of owners who build is worth more than one who does.

Bring a build. Share what worked. Steal each other's prompts. Get better every month.

Prompt sheet

Free course