HRichnetworks, LLC

Where Technology Becomes Your Trusted Business Partner

AI BUSINESS READINESS STARTER WORKBOOK

A beginner-friendly guide to choosing your first practical AI step

Start with clarity. Choose a useful task. Protect your information.

- ☐ Discover where AI could support your business
- ☐ Identify repeated tasks and practical opportunities
- ☐ Build a safe, review-first AI workflow
- ☐ Create your own seven-day starter action plan

YOUR STARTING POINT

You do not need to be a technology expert or buy more software. Start by understanding one real business problem and choosing a manageable next step.

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02 | Your starting point

A quick snapshot of where your business stands today. There are no right or wrong answers.

- ☐ I have clearly defined business goals for the next 90 days.
- ☐ I can identify repetitive tasks that take too much time.
- ☐ My website or online presence gives visitors a clear next step.
- ☐ I have a reliable way to track leads and customer follow-ups.
- ☐ I understand what information should NOT be shared with an AI tool.
- ☐ I review AI-generated information before using or publishing it.

My business goal for the next 90 days:

One area where I would like more clarity:

03 | Find the time-consuming tasks

Look for repeated, low-risk work. AI can assist with drafts and organization, but you remain responsible for reviewing the result.

- ☐ Drafting first versions of social media captions or emails
- ☐ Brainstorming customer FAQs or content ideas
- ☐ Organizing meeting notes that contain no sensitive details
- ☐ Creating outlines for presentations or training materials
- ☐ Developing checklists and standard operating procedures
- ☐ Summarizing non-confidential research or public information
- ☐ Other: _____

START SMALL

Choose a task that is frequent, easy to check, and does not require sharing private customer or employee data.

Task I want to explore first:

How do I currently complete this task?

04 | Choose one useful AI opportunity

Use these three questions to select a first experiment instead of trying five new tools at once.

1. Is it repeated?

Do I perform this task weekly or more often?

☐ Yes Not yet

2. Can I check it?

Can I easily review the draft for accuracy, tone, and usefulness?

☐ Yes Not yet

3. Is it safe to test?

Can I work without sharing passwords, private records, or confidential information?

☐ Yes Not yet

IF YOU ANSWERED "YES" THREE TIMES

You may have a good first experiment. If not, choose a different task or reduce the amount of information you share.

My selected opportunity:

What would success look like for this one task?

05 | Protect your business information

AI tools can be useful without receiving sensitive business data. Apply your organization's policies before using any tool.

- ☐ Do NOT paste passwords, API keys, or account recovery codes.
- ☐ Do NOT paste customer financial details, personal records, or confidential contracts without authorization and suitable safeguards.
- ☐ Check tool privacy settings, access permissions, and data retention policies.
- ☐ Use sample or fictional data when exploring a new workflow.
- ☐ Verify claims, calculations, names, sources, and legal or financial information.
- ☐ Keep a human responsible for reviewing and approving the final result.

SMARTER, SIMPLER, SAFER

Example: Replace a real customer name and email with "Customer A" and "customer@example.com" when testing a draft response.

What information must stay out of my AI prompts?

06 | Build your first useful prompt

Be specific about the business goal, audience, task, constraints, and how you will review the response.

ROLE	Act as a practical assistant for a [type of business].
GOAL	I want to [business outcome].
AUDIENCE	The intended audience is [who will use or read it].
TASK	Create [draft, outline, checklist, ideas, or summary].
GUIDELINES	Use a [tone] voice. Avoid assumptions and unsupported claims.
OUTPUT	Format your answer as [steps, bullets, table, short paragraphs].

EXAMPLE - USE ONLY NON-CONFIDENTIAL INFORMATION

"Create a friendly 120-word FAQ answer explaining how a service business schedules initial consultations. Do not invent prices or policies. Mark details I need to confirm."

My practice prompt:

07 | Add the human review step

A useful draft is not automatically a ready-to-send result. Always review before publishing, sending, or automating.

- [ ] Accuracy: Are the facts, prices, links, and names correct?
- [ ] Voice: Does the message sound like my business?
- [ ] Privacy: Did I exclude sensitive and confidential information?
- [ ] Clarity: Will my audience understand what to do next?
- [ ] Fairness: Did I check for inappropriate assumptions or bias?
- [ ] Approval: Who must authorize this before it is used?

ILLUSTRATIVE WORKFLOW - NOT AN AUTOMATIC SETUP

Website inquiry > CRM > AI-assisted draft > Human review > Follow-up. Every connection requires proper configuration, permission controls, and testing.

Who reviews the final output in my business?

08 | Your seven-day starter action plan

Build confidence one small step at a time. Modify the plan to suit your business and schedule.

- ☐ DAY 1 | Choose one repeated task and define the goal.
- ☐ DAY 2 | Write down how the task works today.
- ☐ DAY 3 | Review privacy risks and choose safe example data.
- ☐ DAY 4 | Use the prompt builder to create a first draft.
- ☐ DAY 5 | Review the result, correct errors, and adjust the prompt.
- ☐ DAY 6 | Test the improved version on a second safe example.
- ☐ DAY 7 | Decide whether to repeat, revise, or stop the experiment.

My first action and target date:

What I will measure or observe:

09 | Your next step

You have a starting point. Continue by improving one useful business process, not by collecting more tools.

My biggest insight from this workbook:

My next practical step:

WHEN YOU ARE READY FOR PERSONALIZED GUIDANCE

HRichnetworks offers a Clarity & Confidence Strategy Session to explore business challenges, digital visibility, CRM, automation, and practical AI opportunities.

Clarity & Confidence Strategy Session

Two hours | $197

Book a session:

https://hrichnetworksllc.as.me/ClarityandConfidenceStrategySession

More free educational resources: www.HRichnetworks.com

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