



How Business Owners Can Take Advantage Of AI



Gail Zona

Founder

Entrepreneur

Former tech exec



I have helped 700+ people, learn how to use AI to accelerate growth in their business.



(1) Newbie



(2) Dabbler



(3) Dazzler

Where would you categorize yourself with AI?

Here's what you will learn today

How to use AI the right way

- Privacy, prompting, customization

How to do things faster

- Social posts, newsletters, emails

How to do things better

- Learn what your clients really think, streamline operations, make better decisions faster

Brainstorm new ideas

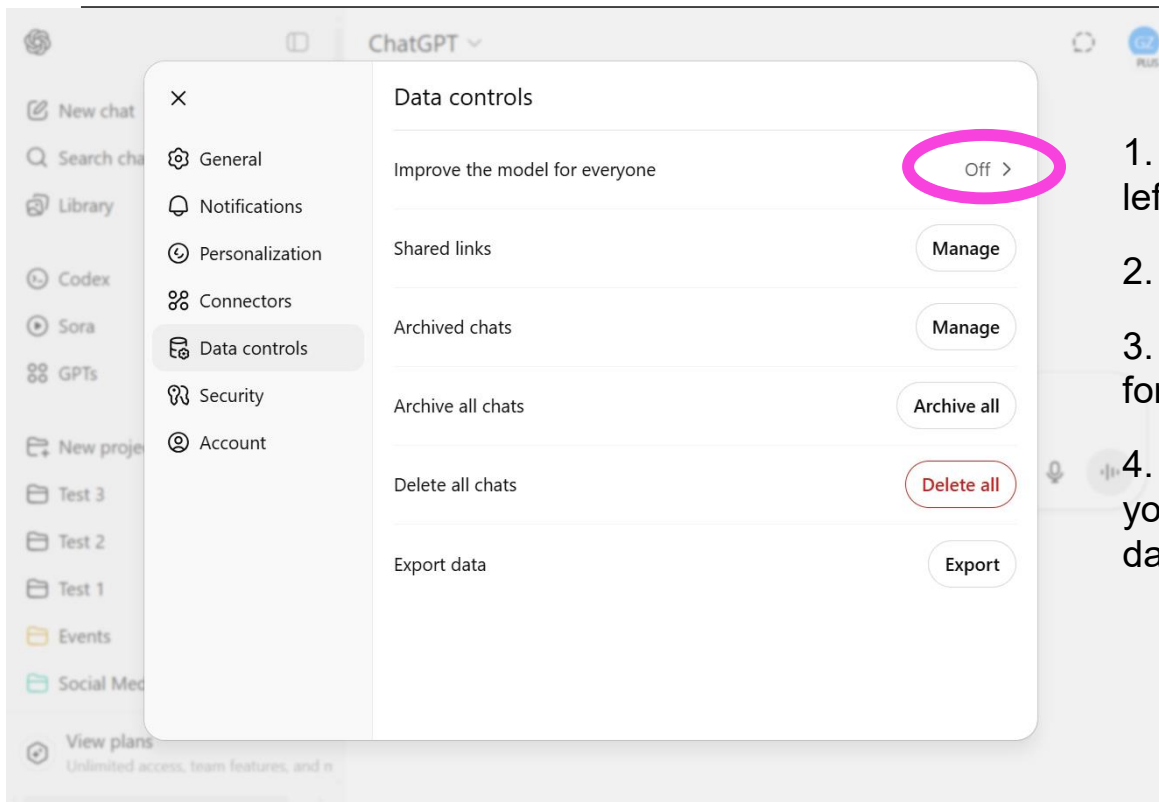
- Social media, new services and products, converting prospects into clients



How to use AI the right way

What do I need to know?

Set AI to keep your information private



1. Click on colored dot in lower left hand corner with your initials.
2. Click on Data Controls.
3. Click on “Improve the model for everyone” and turn it OFF
4. Now ChatGPT will NOT use your chats to add to its database.

How to use AI to get the best results

Start with the Persona for your Prompt

Persona



What role do you want the AI to assume?

- *An expert in social media?*
- *A business strategist?*
- *A marketing guru?*

Basic Prompt Structure

Start with the Persona for your Prompt

Persona



You are a Linked In expert, skilled in creating engaging posts for financial advisors. You include relevant information in your posts, a catchy hook to stop the scroll, and always include a call to action.

Basic Prompt Structure

Then, give it your Backstory

Persona



You are a Linked In expert, skilled in creating engaging posts for financial advisors. You include relevant information in your posts, a catchy hook to stop the scroll, and always include a call to action.

Backstory



What does the AI need to know about?

- *Your company?*
- *Your clients?*
- *The situation?*

Basic Prompt Structure

Then, give it your Backstory

Persona



You are a Linked In expert, skilled in creating engaging posts for financial advisors. You include relevant information in your posts, a catchy hook to stop the scroll, and always include a call to action.

Backstory



I am Jane, a Financial Advisor in Massachusetts, with 10 years of experience, specializing in working with young professionals who are early in their careers and just starting a family. I focus on education, mindset, and how to change their habits now to create a sound plan for their future goals.

Basic Prompt Structure

Finally, ask it to do something for you, the Task

Persona



You are a Linked In expert, skilled in creating engaging posts for financial advisors. You include relevant information in your posts, a catchy hook to stop the scroll, and always include a call to action.

Backstory



I am Jane, a Financial Advisor in Massachusetts, with 10 years of experience, specializing in working with young professionals who are early in their careers and just starting a family. I focus on education, mindset, and how to change their habits now to create a sound plan for their future goals.

Task



What do you want the AI to do for you?

- *Write a social media post?*
- *Give you insights about your clients?*
- *Create a template for annual reviews?*

Basic Prompt Structure

Finally, ask it to do something for you, the Task

Persona



You are a Linked In expert, skilled in creating engaging posts for financial advisors. You include relevant information in your posts, a catchy hook to stop the scroll, and always include a call to action.

Backstory



I am Jane, a Financial Advisor in Massachusetts, with 10 years of experience, specializing in working with young professionals who are early in their careers and just starting a family. I focus on education, mindset, and how to change their habits now to create a sound plan for their future goals.

Task



Create a post introducing me that would be engaging and informative to my prospective clients and that sets me apart from others. Use benefits-oriented language.

Changes over time

Prompts now need to have richer info

2024



You are a
Linked In
expert.



I am a
financial
advisor.



Create a post
for me.

2025

You are a Linked In expert, skilled in creating engaging posts for financial advisors. You include relevant information in your posts, a catchy hook to stop the scroll, and always include a call to action.

I am Jane, a Financial Advisor in Massachusetts, with 10 years of experience, specializing in working with young professionals who are early in their careers and just starting a family. I focus on education, mindset, and how to change their habits now to create a sound plan for their future goals.

Create a post introducing me that would be engaging and informative to my prospective clients and that sets me apart from others. Use benefits-oriented language.

Today, we are going deeper

*We will learn how to
take this to the next
level today.*

*So you get the very
best results from
ChatGPT.*

Customizing AI

Here's how to start.



You are a marketing and branding expert for professional services firms.



Use my website to get the basic information about my service offerings, approach, and target clients:

<https://www.learnaiforbiz.com>



Summarize this into 2 paragraphs.

Save to memory.



You can use AI to help you figure out your unique value proposition as well, ie how you stand out from your competitors.

[Want to know how? Schedule a FREE Discovery Chat.](#)



How to do things faster

What kinds of things can I do?

Creating a social media post

Linked In prompt 



You are a Linked In expert, skilled in creating engaging posts for insurance agents in Massachusetts. You include relevant information in your posts and always include a call to action. You use emoji's sparingly and only for bullet points. You create catchy hooks that stop the scroll.



I am Brian, a property and casualty insurance agent with Best Insurance, located in the Andover, MA area. We specialize in protecting tradesmen, manufacturers, and IT firms. Our tailored policies cover general liability, property damage, business interruption, and commercial auto, giving small businesses the right protection without one-size-fits-all solutions. With affordable coverage, fast claims, and proactive risk support, we provide peace of mind and act as a trusted partner helping business owners safeguard operations and grow with confidence.



Create a post highlighting the top 3 things that we help our clients with. Make it engaging and informative to my prospective clients and that sets me apart from others.

Changing format, and tone

Email Newsletters



You are an email marketing expert, skilled in creating posts for the insurance industry that get opens, clicks and shares. You always include a call to action and a catchy title that stands out in inboxes as well as a PS.



Rewrite the post above for a newsletter.

Change the tone to be more casual and conversational. Not salesy.



AI doesn't have to sound like a robot. If you train it on your business, your clients and your brand tone, it will sound just like you only better and much, much faster.

[Want to know how? Schedule a FREE Discovery Chat.](#)



How to do things better

What kinds of things can I do?

Client and Donor Insights

Learn what they really think



You are a marketing expert skilled in helping small non-profits really learn more about their donors.



I am Winona, Executive Director of Helping Hands, a small nonprofit dedicated to supporting families in Methuen by providing essential food and clothing. We rely on our donor contributions from local businesses, local banks, and other community donors.



What are top 10 things my donors accomplish for themselves by giving us donations?

What are the reasons they would NOT give us donations?

Follow Up emails – *fast!*

Secret? Create a custom template



You are a communications expert skilled in helping realtors communicate effectively with their prospects and clients.



I am Sara, a realtor in the Haverhill, MA area. I work primarily with older clients who are retiring, already retired, or who are downsizing.



Create a follow up email template for me that starts with a friendly greeting and a few sentences based on our conversation. If there is something personal in nature that we discussed, put that part first. Then use bullet points for the bulk of the conversation, and finish with the appropriate To Do list for the client and the To Do list for me. Close the email with: All the best, Sara. Make the tone friendly, helpful and casual.



Once you have the template, take your Zoom transcript or dictate your notes, and 'mash' the conversation into the template. The results will be like magic!

[Want to know how? Schedule a FREE Discovery Chat.](#)

Use AI to help with tough questions

Use AI as a sounding board



You are a business strategist for an IT services company. You understand how and when to raise prices and the impacts it will have on a business.



I am Mark, the owner of 24/7 IT. We are a small IT services company that helps businesses keep their technology reliable and secure. From network management and cloud systems to troubleshooting and cybersecurity, we make sure operations run smoothly. With personal service and tailored solutions, we act as a trusted partner so clients can save time, reduce stress, and focus on growth.



I am considering raising my prices. What information do you need to know to help me with that decision?



Having a 'conversation' with AI can lead to some truly groundbreaking results!

[Want to know how? Schedule a FREE Discovery Chat.](#)



Brainstorm new ideas!

How can I get new ideas for all areas of my business?

Brainstorming

Content Calendar for social media



You are Linked In expert skilled in helping small accounting and tax preparation firms.



I am Linda, owner of a 6 person accounting and tax firm, Linda's Accounting Services. We are a small firm that provides bookkeeping, accounting, and tax preparation services tailored for small businesses in the Merrimack Valley in Massachusetts. By offering reliable financial management and personalized support, we help business owners stay organized, save time, and focus on growth.



Create a content calendar for Linked In posts from September 15 – November 15. I will be doing 2 posts a week. I want it to be interesting content that people would read and share. Make 50% of it about what I do and 50% about topics of interest to my clients. Take seasonality into account. Create in a table format.

Brainstorming

Campaigns that turn prospects into clients



You are a business and marketing expert for estate planning attorneys.



I am Geoff, owner of an estate planning law practice. I host periodic seminars about educating families on estate planning basics and strategies, including estate and gift taxes, special needs trusts, protecting family wealth, blended families, and healthcare for end of life planning.



What kind of campaign would be most effective for turning the list of participants in my recent seminar into clients?

What are some novel ways I can keep in touch with these participants?



You can have AI actually prepare all the content for this campaign saving you hours!
Want to know how? [Schedule a FREE Discovery Chat.](#)



Are you
buzzing with
ideas of how
this could
help you?

*Here are some
more ideas!*

Even more ways you can use AI!



Where can I find more leads?
How do I turn leads into clients?
How can I close more sales?
Should I raise my prices?
How do I save more time?
How can I create MLS Listings?
Should I hire someone?
How do I get more referrals?
Should I open another office?

Thank you!

See the flyer to get the slides from today



Gail Zona

Founder Learn AI for Biz



FREE 30 minute Discovery Chat with me:
gail@learnaiforbiz.com



Follow me on Linked In:
<https://www.linkedin.com/in/gail-zona/>



Learn more about our services:
<https://www.learnaiforbiz.com>

If you would like to have a private, 1-on-1 discussion specifically about how AI can help YOUR business, just email me and we can set up a FREE Discovery Chat!