

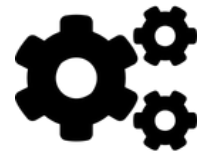


EVALUER ADAPTER AVANCER
3SENS.AI
ASSESS ADAPT ADVANCE

AI Fundamentals for SMBs

Practical AI Applications for Small & Medium-Sized Businesses

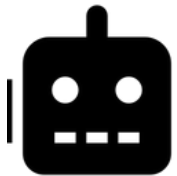
What is AI and when to use it?



Software

Fixed rules
Steps programmed

Example: Spreadsheet
formulas



Automation

Executes tasks
automatically
Based on software rules

Example: Email auto-
responders



AI

Learns from data
System interprets, predicts,
and generates

Example: Content generation,
chatbots

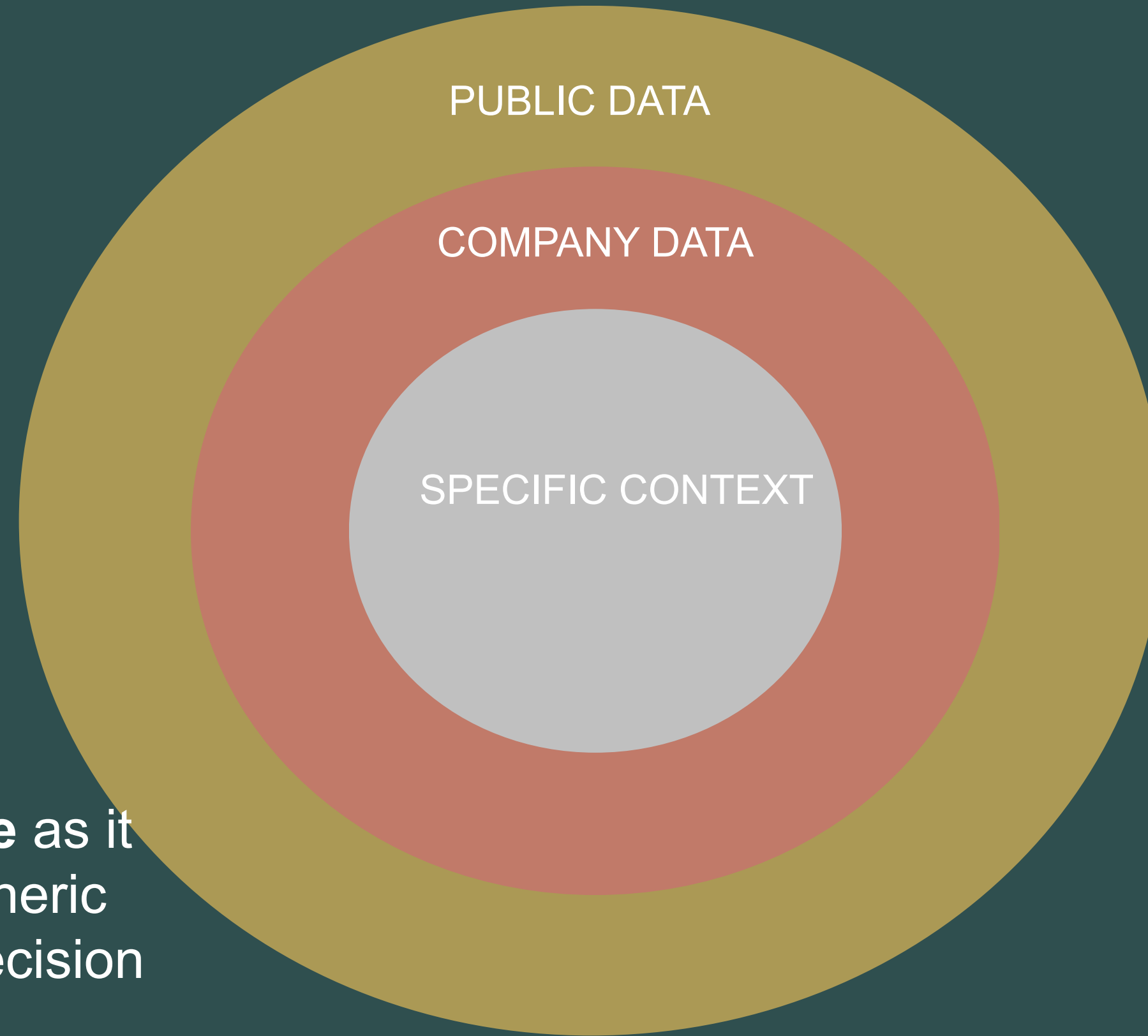
The Rule of Thumb

If a task:

- Is repetitive
- Follows a structure
- Uses text, data, or forms
- Has examples to learn from

It's a candidate.

The 3 Circles of AI: From Data to Decision Advantage



AI becomes more **valuable** as it moves inward — from generic knowledge to contextual decision support.

AI is Critical for SMBs Today



Competitive Positioning

AI levels the playing field—automate tasks that used to require large teams



Reduce Operating Costs

Cut repetitive work costs substantially while improving output quality



Scale Without Hiring

Handle a multitude of customer inquiries, content, or data processing with same staff



Make Decisions Faster

Analyze data, market trends, and customer behavior in minutes, not weeks

Where SMBs get the Best ROI



Sales Outreach

Lead qualification - personalized outreach - higher conversion



Marketing Content

Social media posts - blogs - email campaigns



Operations: Billing & Invoicing

Invoice generation - payment follow-up - expense tracking



Customer Service

Manage workload - customer experience - data analytics



Documentation and Knowledge Base

SOPs, Onboarding - Training - Knowledge Maintenance



Sales Outreach

More Converted Leads

AI qualifies leads and provides personalized automated followup

Lead Qualification

- Chatbot can answer questions
- Agents can ask questions
- 24/7 availability
- Scoring assigned

Personalized Outreach

- Hyper personalized content
- Predictive scoring
- Automated follow-up

Higher Conversion

- Intent signals
- Engagement velocity
- Real-time objection handling



Marketing Content

Amplify Effort

AI helps extend marketing content to different formats and platforms

Social Media Posts

- Generate 30 days of content in few minutes
- Adapt tone for each platform

Blog Articles

- Draft long-form content from outlines
- Optimize for keywords automatically

Email Campaigns

- Personalize messaging at scale
- Write subject lines that convert

\$ Operations: Invoicing & Billing

From Hours to Minutes

AI handles data entry, calculations, follow-ups, and reconciliation automatically

Invoice Generation

- Extract data from emails/docs
- Auto-populate templates
- Apply correct pricing rules
- Generate in bulk

Payment Follow-up

- Track overdue invoices
- Send reminder emails
- Escalate to collections
- Update status in accounting system

Expense Tracking

- Categorize receipts
- Match to transactions
- Flag anomalies
- Generate expense reports



Customer Service

Efficient and Effective

AI handles data entry, calculations, follow-ups, and reconciliation automatically

Reduced Workload

- Instant FAQ deflection
- ticket triage
- 1-click summarization

Customer Experience

- 24/7 availability
- hyper personalized recommendations
- real-time language translation

Data Analytics

- sentiment analysis
- trend and pattern spotting
- predictive churn



Documentation & Knowledge Base

Adaptive and Personalized

AI handles SOPs, training and personalized knowledge

SOPs

- Auto generated visual guides
- video to document conversion
- instant policy drafting

Onboarding / Training

- adaptive learning paths
- onboarding concierges
- interactive simulations

Knowledge Maintenance

- knowledge gap detection
- verification workflow
- semantic search

AI TOOLS for SMBs


WRITING & CONTENT

ChatGPT Plus

 \$20/mo

General writing, research, Q&A

Claude Pro

 \$20/mo

Long docs, analysis, reasoning


Jasper

 \$49/mo

Marketing copy & campaigns


IMAGE & DESIGN

NanoBanana

 \$10-\$60/mo


High-quality AI image generation

Adobe Firefly

 Incl. in CC

Design assets, generative fill


Canva AI

 \$15/mo

Templates + Magic Write/Design


PRODUCTIVITY

Microsoft Copilot

 \$30/user/mo

Word, Excel, Teams, Outlook AI

Notion AI

 \$10/user/mo

Notes, wikis & project summaries

Otter.ai

 \$17/mo

Meeting transcription & summaries

SPECIALIZED / FIELD

HubSpot AI

 \$15-\$90/mo

CRM, email & sales automation

QuickBooks AI

 \$30-\$90/mo

Bookkeeping & cash flow insights

Harvey / Clio AI

 \$Custom

Legal docs & contract review

 *Start with ONE tool that solves your biggest pain point. Master it before adding more.*

Real Risks. Real Returns



Key Risks

Data Privacy

Accuracy Issues

Over-Reliance

Cost Creep



ROI Calculator

1. Identify task
2. Measure current time spent
3. Estimate AI time reduction
4. Multiply by hourly cost
5. Compare to AI tool cost

AI ETHICS & BEST PRACTICES

VERIFY EVERYTHING

Always have a **qualified person** review AI-generated specs, contracts, and safety plans before use. Garbage in - garbage out.

PROTECT SENSITIVE DATA

Never input client PII, financial records, or trade secrets into public AI tools. Use enterprise-grade platforms with data privacy agreements.

DISCLOSE AI USE

Be transparent with clients when AI assists in deliverables. Review your contracts — some clients or jurisdictions may require disclosure.

HUMAN IN THE LOOP

AI assists — **it doesn't replace judgment**. Keep a qualified human accountable for every decision, especially in safety-critical situations.

WATCH FOR BIAS

AI models can reflect biases in training data. Review AI outputs for fairness in hiring recommendations, supplier selection, and pricing.

KNOW YOUR LIABILITY

You own the output. If an AI-assisted document causes harm, your business is responsible. Consult your insurer and legal counsel on AI policies.

 **Start small, document your process, review outcomes, and build trust incrementally — with your team and your clients.**

NEXT STEPS

Identify 1-2 High Impact Cases

Focus on areas with fast ROI and low risk.

01



Run a 30-Day Pilot

Define success metrics (time saved, cost reduced, errors eliminated)
Test with a small team or single workflow
Measure results weekly
Adjust and refine before scaling

03



Scale What Works

Once the pilot proves ROI:
Automate adjacent workflows
Standardize prompts and processes
Build a lightweight AI policy
Track ROI monthly
AI becomes a multiplier when rolled out gradually and intentionally.

05



Choose the Right Tools for Your Needs

Start with tools that integrate easily with your existing systems.

02



Train Your Team

Provide short, role-specific training
Create simple internal AI guidelines
Encourage experimentation with guardrails
Build confidence before expanding usage
Teams that understand AI adopt it faster and use it more responsibly.

04



Get Support When Needed

Book a strategy session
Join an AI workshop
Use templates, playbooks, and best practices
Lean on experts for complex workflows
You don't need to do everything at once—just start with one meaningful win.

06



Ready to Get Started?



Free Consultation

30-min strategy session to identify quick wins



Pilot Project

Start with one use case, prove ROI in 30 days



Team Training

Get your staff AI-ready with hands-on workshops

Drop your questions in chat or reach out:

info@3sens.ai | www.3sens.ai