



10[C]hats

An AI Adoption Workbook for Entrepreneurs and Small Business Owners

*As an entrepreneur, you wear a lot of hats.
Now instead of wearing 10 hats, you can have 10 chats.
10[C]hats: AI Solutions for Every Hat You Wear*

*Created by the **West Central Minnesota SBDC**, part of the **AI Resource Lab***

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*AI is changing how businesses operate, but not everyone is at the same stage. Some are just **starting to explore** AI, while others are **already using it daily**. No matter where you are, the goal is to **take the next step forward** without overcomplicating things.*

Introduction: Rethinking AI – From Magic Trick to Management Partner

This is not a tech manual. It's a mindset shift.

Most entrepreneurs think AI is a “thing” you use—like an app or a machine. In reality, AI is a way of thinking. It's about how you explore, decide, communicate, and plan.

That's why this workbook is built around the idea of **10[C]hats**: You wear a lot of hats in your business—marketing, finance, HR, operations. Now, instead of trying to do everything yourself (aka “wearing 10-hats”), you can open 10 smart conversations with AI (aka “having 10-chats”) to help you manage those areas more clearly, quickly, and creatively.

But make no mistake: **AI doesn't do it for you**. You still lead. You still decide. AI simply helps you think and act better, with less friction and more confidence.

This is your crash course in AI adoption—a field guide, a workbook, and a thinking partner to help you harness the mindset for success with AI. Each section is based on where you are in your journey. Start where you are. Grow from there.

Let's build your next chapter, one chat at a time.

Instructions: Pick Your AI Journey

- **Step 1.** Review each stage of the roadmap on page 5
- **Step 2.** Pick which one that fits you best
- **Step 3.** Jump into that chapter and let the workbook guide your journey. Explore at your own pace—look back, peek ahead, or take it step by step. Just keep going—progress is the goal!

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The Four Phases of AI Readiness

This workbook is divided into four core sections. Each section matches a phase of your AI adoption journey.

- **Section 1: Awareness**

You've heard of AI, but don't know what to do with it. This section explains core concepts and helps you try simple experiments to build confidence.

- **Section 2: Consideration**

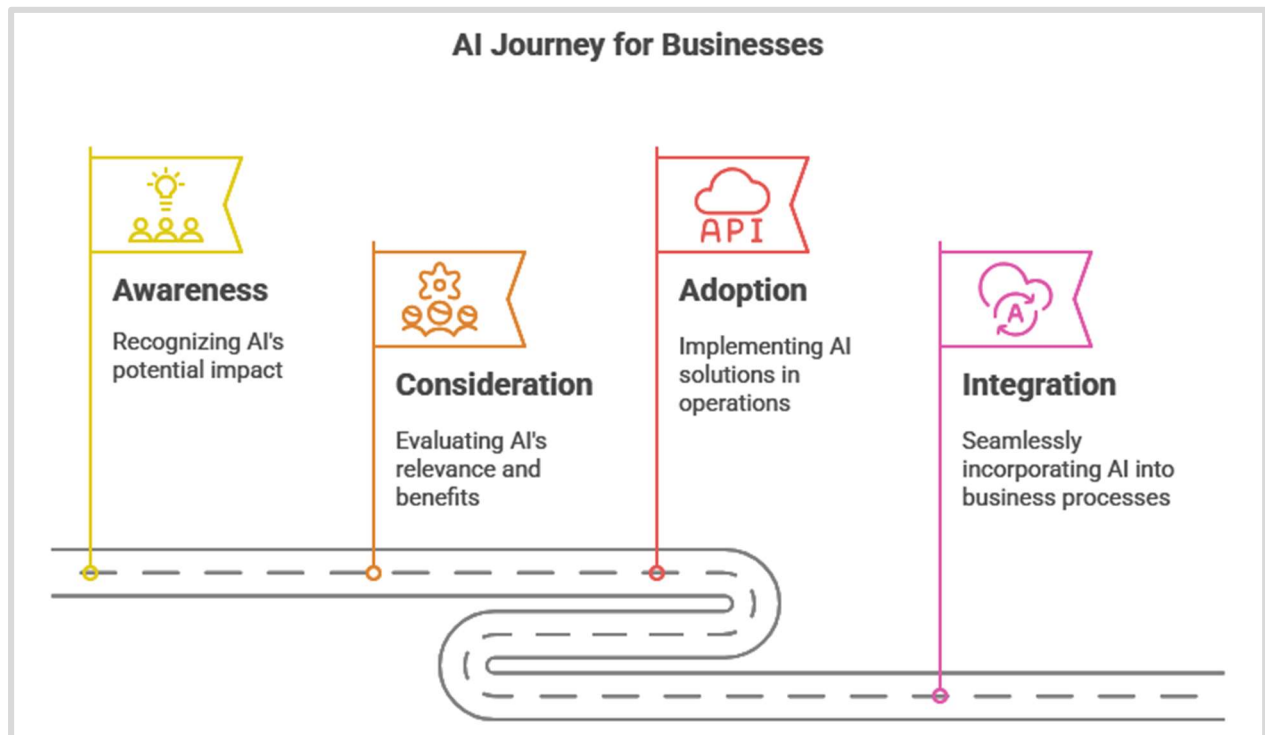
You're interested, but overwhelmed. This section helps you explore the right tools, understand prompting, and find your best use cases.

- **Section 3: Adoption**

You're using AI—but it's inconsistent. This section helps you build systems, refine prompts, and use AI more strategically and routinely.

- **Section 4: Integration**

You're ready to build AI into how your business runs. This section includes ROI, feedback loops, Shadow AI strategy, and long-term planning.



Each section includes real examples, trainer tips, reflection boxes, and tools you can use right away. This is the AI 101 certification course you wish existed—for real-world entrepreneurs who are ready to think smarter, not just work harder.

A repeating pattern of blue line-art fedoras and hexagons on a white background with horizontal lines. The pattern is composed of two main elements: a fedora hat and a regular hexagon. These elements are arranged in a staggered, repeating fashion across the image. The fedoras are oriented with their brims facing forward, and the hexagons are oriented with one flat side facing the viewer. The pattern is set against a background of thin, horizontal black lines.

1.1 What Is Generative AI (Really)?

AI is not one thing. It's not a robot or an app. In this workbook, we're talking about **generative AI**—a specific kind of artificial intelligence that creates new content based on patterns in existing data.

Put simply: **Generative AI turns your ideas into drafts, outlines, answers, or images—
instantly.**

You give it a question, a task, or an idea. It gives you something back. That's what tools like ChatGPT, Claude, or Gemini do: they generate content that sounds natural, useful, and human-like.

What Makes This Useful?

Most small business owners don't need to "know AI." They need to know:

- How to communicate with it
- What it can help with
- When to trust it (and when not to)

Generative AI is like hiring a fast-thinking assistant. The more clearly you ask for what you need, the better it performs.

What Can It Help With?

Here are just a few real business use cases:

- Writing a thank-you email to customers
- Brainstorming product names
- Outlining your next 3 social media posts
- Rewriting website copy in a friendlier tone
- Summarizing a long PDF in plain language

1.2 Key Terms & Concepts (Without the Jargon)

Before you start prompting AI, it's important to understand the different **types of prompts** and how language models work behind the scenes. Not all prompts are created equal. The way you ask matters.

Prompting Styles Explained (Basic Prompts to Start with Now):

Zero-Shot Prompting

You ask a question or make a request with no prior examples. Best for straightforward requests.

"Write a product description for a handmade dog collar."

Few-Shot Prompting

You provide 1–3 examples so the AI can follow a pattern.

"Here's an example caption: 'Bring your pup in for a treat!' Write 3 more like this."

Chain-of-Thought Prompting

You break a big task into a series of logical steps.

"First, help me define my audience. Then create 3 post ideas based on that audience."

Role-Based Prompting

You tell the AI to act like a specific expert.

"Act as a brand strategist. Help me rewrite this paragraph for clarity and emotion."

Instructional Prompting

You give direct, structured tasks with outcomes and constraints.

"Write a 3-sentence bio for my business in under 75 words, using a friendly tone."

Conversational Prompting

You chat back-and-forth and let the conversation evolve.

"This isn't quite what I meant. Can you make it simpler and more energetic?"

How Large Language Models (LLMs) Work (In Simple Terms)

LLMs, like ChatGPT or Claude, are trained on massive amounts of text data. They don't "think" the way humans do. Instead, they generate text by predicting what comes next based on patterns. They are not always correct and **do not know facts**—they infer based on training.

Limitations to Know:

- **Hallucination:** AI might make up facts. Always verify important details.
- **Recency blind spots:** AI doesn't know current events past its last update.
- **Biases:** AI can reflect societal or cultural biases based on its training data.
- **Privacy risk:** Don't share confidential or sensitive business information.

These styles can be mixed and matched. The more you practice, the more naturally you'll shift between them.

Reflection Prompt

Which prompting style above seems most natural to you?

[Write here]

Which one do you want to try first?

[Write here]

A Few Key Definitions and Terms to Know (You'll Learn More, But Here are the Basics)

AI (Artificial Intelligence): Software that mimics human thinking or creativity.

Generative AI: AI that can create new content (text, images, video, code) based on your prompts.

LLM (Large Language Model): A type of AI trained on massive text datasets to predict what words come next.

Prompt: A message or question you give to the AI. The quality of the prompt shapes the quality of the response.

Chatbot: The platform you interact with to “talk” to AI (e.g., ChatGPT, Claude).

Hallucination: When AI makes something up that sounds real but isn't. Always fact-check outputs.

Multimodal AI: AI that can understand images, text, audio, and more—not just words.

Reflection Prompt

Which of these terms were new to you? Which ones have you heard but didn't fully understand?

[Write here]

What's one thing about generative AI that now feels clearer?

[Write here]

1.3 First-Time Prompts & Chat Examples

Let's walk through your first AI conversations. Think of it like talking to a helpful assistant—you're not trying to impress it, you're just trying to be clear.

These prompts work best when you add context. AI isn't magic—it's a pattern machine. The more you give it, the better the response.

Beginner Prompts to Try

Prompt 1: Get Ideas

"Give me 10 creative ideas for a business that sells handmade pet accessories."

Prompt 2: Improve Something You Wrote

"Make this social post sound more fun and casual: [Paste your content here]"

Prompt 3: Write from Scratch

"Write a short thank-you email to a customer who just bought their first product from my online store."

Prompt 4: Compare Options

"List the pros and cons of selling my product online versus at craft fairs."

Prompt 5: Learn Something New

"Explain what an LLC is in plain language, as if I've never run a business before."



Tip: You don't have to be formal. Try talking to AI the way you'd talk to a real assistant or coworker.

Reflection

Which of these felt easiest for you to try?

[Write here]

Which one was most surprising or useful?

[Write here]

Would you want to keep refining or exploring more with one of these?

[Write here]

1.4 Experimenting with AI: Low-Risk Ways to Start

If you're new to AI, the goal isn't to get a perfect answer. The goal is to get comfortable asking better questions.

Three Ways to Start Small

1. Use AI for Something You Already Do, Like as a Search Engine or Familiar Tasks

Pick a weekly task like writing a reminder email or updating your to-do list. Ask AI to help.

2. Use AI to Review, Not Create

Have AI proofread something or suggest improvements instead of writing from scratch.

3. Use AI as a Practice Partner

Try saying, "Act like a business coach. Ask me 3 questions to help me reflect on my goals this quarter."

Fill-In Exercise

- What's one thing you do every week that takes time or energy?

[Write here]

- Try prompting AI for support with it. What did it return?

[Write here]

- Did the result help or spark ideas?

[Write here]

 *Section Complete: You now understand the basics of what AI is, what it can do, and how to begin experimenting.*

Up next: **Section 2 – Consideration**, where we explore how to evaluate tools, structure better prompts, and find your fit in the AI landscape.



"I'm Curious About AI, But I Don't Know Which Tool to Pick."

I've played around with some AI tools, and I see the potential. But now I'm stuck—I don't know which one is actually worth using. There are a million options, and I don't want to waste time on something that won't fit my business. I need something simple, useful, and not another tech headache.

- ### What I did to move forward:

-  **Your Next Step:** Choose **one** AI tool and apply it to **one** business task. Don't try to overhaul everything at once—just get started.

[illegible]

2.1 Prompting Frameworks (COSTAR, RIPE, CRAFT)

At this stage, you're ready to level up your prompting. These frameworks give you structure to get better answers—faster, more accurate, and more useful.

COSTAR Framework

- **Context:** What's going on?
- **Objective:** What do you want to achieve?
- **Style:** Should it be formal, playful, direct?
- **Tone:** Energetic? Calm? Persuasive?
- **Audience:** Who is this for?
- **Response:** What format or length do you need?

Example Prompt:

"You are an email marketer. Context: A local bakery wants to increase foot traffic. Objective: Write a short email for a weekend special. Style: Friendly. Tone: Energetic. Audience: Local customers. Response: 150 words max."

RIPE Framework

- **Role:** Who should the AI pretend to be?
- **Input:** What details do you provide?
- **Process:** What should it do with the input?
- **Expectation:** What kind of result do you want?

Example Prompt:

"Act as a customer service trainer. Input: My email exchange with a frustrated client. Process: Review and identify what I did right and wrong. Expectation: Give me 3 suggestions to improve future responses."

CRAFT Framework

- **Clarity:** Be clear about the task.
- **Role:** Assign a voice or position.
- **Aim:** Define your desired outcome.
- **Framing:** Give some background.
- **Tone & Constraints:** Keep it consistent and manageable.

Example Prompt:

"Act as a business coach. Help me write a one-paragraph explanation of what makes my business unique. Keep it friendly, short, and written at a 7th grade reading level."

Prompting Practice & Reflection

Pick one of your recent business tasks. Use one of the frameworks above to write a prompt for it.

What task are you working on?

[Write here]

Which framework are you using?

[Write here]

Write your full prompt here:

[Write here]

What result did you get back from the AI? Did it work?

[Write here]

2.2 Tool Overviews & Comparisons

By now, you’ve probably heard about dozens of AI tools. But which ones are actually worth your time—and why?

We’ll keep this simple. Below is a curated set of categories and examples based on how small businesses are actually using them.

Writing & Communication

Tool	What It’s Good For
ChatGPT	Versatile writing, emails, brainstorming, summaries
Claude	Longer responses, large document processing
Notion AI	Integrated note-taking, meeting agendas, checklists
GrammarlyGO	Rewriting and editing with tone control

Design & Branding

Tool	What It’s Good For
Canva (Magic Write)	Templates, social posts, flyers, logos
Adobe Firefly	Custom branding visuals and design AI
Looka	AI logo design for new businesses

Voice, Audio, & Video

Tool	What It’s Good For
Pictory	Turn blog posts into short videos
ElevenLabs	Realistic voiceovers from text
Descript	Editing video like a doc, with transcription

Automation & Admin

Tool	What It's Good For
Zapier AI	Automating business tasks (ex: lead forms to email)
Clockwise	Smart calendar optimization
Trello + AI plugins	Task boards, auto-sorted priorities

Considerations When Choosing a Tool

- **Ease of Use:** Will this confuse or empower you?
- **Value to You:** Does it solve a real bottleneck?
- **Data Privacy:** Do you understand what data it uses or stores?
- **Cost:** Try free versions before upgrading.

Try This

- Choose one tool from any category above.
- Go to its website or app.
- Try one task from your own business.
- Reflect:

What tool did you try?

[Write here]

What did it help with?

[Write here]

Will you keep using it? Why or why not?

[Write here]

2.3 Time-Saving Opportunities: 2 Hours/Week = 100/Year

Let's do some math. If you spend just **2 hours per week** on a recurring business task, that adds up to **100+ hours per year**.

That's 100 hours you could reinvest into growth, clients, strategy—or rest!

AI can help you reclaim that time. This section will help you:

- Spot high-leverage opportunities
 - Identify repeatable processes
 - Prompt AI to take the first draft or planning step
-

Common Time Drains for Entrepreneurs

- Writing emails from scratch
- Rewriting website text
- Manually organizing to-do lists
- Searching for content ideas
- Creating social media posts one-by-one

Each of these can become a simple AI-powered workflow.

Time Reclaim Exercise

Step 1: Identify a weekly or monthly task

[Write here]

Step 2: How much time does this take per week?

[Write here]

Step 3: What's the outcome or deliverable of this task?

[Write here]

Step 4: Try prompting AI to help with it

Example:

"Act as my marketing assistant. Help me create 5 social media posts for this month about [topic]. Include text and hashtags."

Practice your prompt here:

[Write here]

What result did you get back? How much time could that save?

[Write here]

 *Trainer Tip: Anything you do more than 5 times is a good candidate for AI support. If it takes brainpower, writing, or repetitive steps—it belongs on your “automate or augment” list.*

2.4 Use Cases by Business Function

Now that you’ve explored tools and practiced time-saving prompts, let’s zoom out and look at how AI can support different parts of your business.

You don’t have to master all of these—but you *should* recognize where AI can help the most based on your role, challenges, or goals.

Strategy & Planning

- “Act as a business coach. Ask me 5 questions to help me clarify my business goals.”
- “Create a 90-day action plan based on these priorities: [list them here].”

Marketing

- “Write 3 caption options for an Instagram post about our new service.”
- “Create a one-month marketing calendar for a boutique retail store.”

Finance & Admin

- “Explain my P&L statement in simple terms. Highlight what’s improving and what’s a red flag.”
- “Create a monthly sales tracking spreadsheet for a service-based business.”

Operations & Workflow

- “Build a checklist for onboarding new customers.”
- “Create a weekly meeting agenda template for my team.”

HR & Hiring

- “Draft a job posting for a part-time admin assistant at a small business.”
- “List 3 interview questions to assess someone’s time management skills.”

Sales

- “Write a follow-up email for someone who downloaded my lead magnet but hasn’t scheduled a call.”
- “What objections do customers typically have about [your service]? How can I address them?”

Try This

Choose one function where you'd like to improve.

Which area are you focusing on?

[Write here]

Write a prompt you could try for this area:

[Write here]

What would success look like if AI helped in this area?

[Write here]

 *Tip: AI can help you start the process—then you shape and finish it.
Treat it like a collaborator who helps reduce mental load.*

✅ Section 2 Complete: You now know how to frame better prompts, test tools, identify use cases, and move toward AI-powered productivity.



Section 3: Adoption:

"AI Is Helping My Business, But It's Not Fully Integrated Yet."

(Written by a business owner actively using AI but not at full adoption yet)

AI is already making a difference in my business. I use it for content creation, customer support, or organizing my workflow. But right now, it feels like AI is just another tool I use occasionally—not something I fully rely on. I want to take it further, but I don't know how to do that without making things too complicated.

- ◆ **What I realized:** AI works best when it's built into **my routine**, not just something I pull out when I remember.

What I did to move forward:

- ✓ **I created a process**—now AI is part of my daily workflow, not an afterthought.
- ✓ **I trained my team** so we're all using AI the same way.
- ✓ **I started tracking results** to see how much time/money AI was actually saving me.

🚀 **Your Next Step:** Look at what AI is **already working for you**, and build on it. Make it part of your process, not just a one-off tool.



3.1 Building AI Into Daily Routines

The easiest way to adopt AI is to attach it to something you already do:

Examples:

- Start your week by having AI generate a marketing checklist
- Use AI to summarize your daily notes or client sessions
- Have it review your sales email drafts before you send them

AI doesn't have to be one big thing—it can be 10 small ones.

Try This:

Pick a weekly business rhythm you already have.

[Write here]

Now write a prompt that could support or speed up that rhythm.

[Write here]

What outcome would you expect from this prompt?

[Write here]

3.2 Multimodal & Collaborative Use

AI isn't just for typing. Today's tools can understand **images, files, PDFs, voice memos, charts, and more**. That's called **multimodal AI**—and it unlocks new ways to think with your assistant.

Instead of explaining something, you can now **show** it. Upload a photo, paste a spreadsheet, or drag in a business plan draft.

Examples of Multimodal Collaboration

Example 1: Upload a messy to-do list.

Prompt: "This is my current to-do list. Sort it into categories and create a 3-day plan."

Example 2: Upload a marketing worksheet (like the fillable ones in this workbook).

Prompt: "Based on this worksheet, help me write a one-page summary of my business positioning."

Example 3: Screenshot a website.

Prompt: "This is a competitor's website. What's strong about their messaging? What would you suggest I do differently?"

Example 4: Copy/paste a draft of an internal policy.

Prompt: "Improve the tone of this policy to sound more clear, respectful, and approachable."

Try This:

Find something visual, messy, or complex that you normally work on.

What are you going to upload or share with AI?

[Write here]

What do you want help doing with it?

[Write here]

What prompt could you use?

[Write here]

 *Tip: Multimodal tools aren't perfect yet—but they're powerful. When in doubt, give context and ask the AI what it thinks it sees. Then refine from there.*

3.3 Prompt Refinement & Layering

Getting a good result from AI isn't just about writing a "perfect" prompt. It's about learning how to **refine, redirect, and layer** your prompts like a conversation.

Think of your AI chat as a whiteboard you can rewrite in real time. When something doesn't hit right the first time—you don't quit. You iterate.

Prompt Refinement Example:

Round 1 Prompt:

"Write an Instagram caption for a new home cleaning service."

AI Output:

"Make your home sparkle like never before! Book today for 20% off."

Feedback:

That's too generic. I want something that sounds more local and personal.

Follow-up Prompt:

"Try again, but make it feel more community-based, like it's written by a local neighbor."

AI Output:

"Hey neighbors! I just launched a local home cleaning biz and have a few openings this month. If your home needs a refresh, I've got you covered!"

Much better—now we're on brand. That's prompt refinement.

Layering Prompts: Add Detail, Step-by-Step

Layering helps AI work through bigger tasks without becoming confusing.

Layering Example (Content Planning):

1. "Give me 5 content topics for a dog grooming business."
2. "Now turn those into Instagram post ideas."
3. "Write a caption for post #2."
4. "Suggest a photo concept to match that caption."

Each step builds on the last. Instead of asking for everything at once, you create a flow.

Try This:

Pick a prompt that didn't give you the result you wanted. Paste it here:

[Write here]

What didn't work? (Too vague? Too robotic? Off-brand?)

[Write here]

Refine it. Add direction, tone, or audience. Write the improved prompt here:

[Write here]

What changed in the result?

[Write here]

 *Trainer Tip: Save your best prompts somewhere! Once a prompt works well, it becomes a reusable asset, not just a one-time tool.*

3.4 Creating Consistent Output with AI Systems

By now, you’ve tried prompting and refining. But if you want AI to really stick in your business, you need consistency—not just creativity.

That’s where **repeatable systems** come in.

Instead of starting from scratch each time, you can:

- Build templates for recurring tasks
 - Create saved prompt banks
 - Use step-by-step workflows that the AI follows
-

What Is an AI System?

An AI system is a set of prompts and workflows that help you get reliable results, every time. It’s like a playbook.

Examples:

- A weekly content planning system
 - A hiring workflow (write job posting → review candidates → draft emails)
 - A financial summary system (input numbers → generate highlights → suggest next steps)
-

Case Study: Weekly Marketing Assistant

Workflow:

1. Prompt: “Give me 3 content ideas for next week based on this topic: [insert topic]”
2. Prompt: “Write Instagram captions for each one, in a fun and friendly tone.”
3. Prompt: “Suggest one call-to-action for each post.”
4. Prompt: “Create a short checklist to schedule and publish each post.”

Result: A repeatable process you can follow every Monday in 15 minutes.

Build Your First System

Choose a task you do often:

[Write here]

Write the first prompt in that workflow:

[Write here]

Now write the second step (what comes next?):

[Write here]

What would the outcome or deliverable be?

[Write here]

What could you reuse next week to save time?

[Write here]

 *Trainer Tip: A system doesn't have to be complicated. If you can repeat it and improve it—it's a system. Start small and build.*

 **Section 3 Complete:** You now know how to build habits, collaborate in new ways, and create repeatable workflows that reduce friction and boost output.



Section 4: Integration:

"AI Is Now a Core Part of My Business."

(Written by a business owner who has fully integrated AI into their operations)

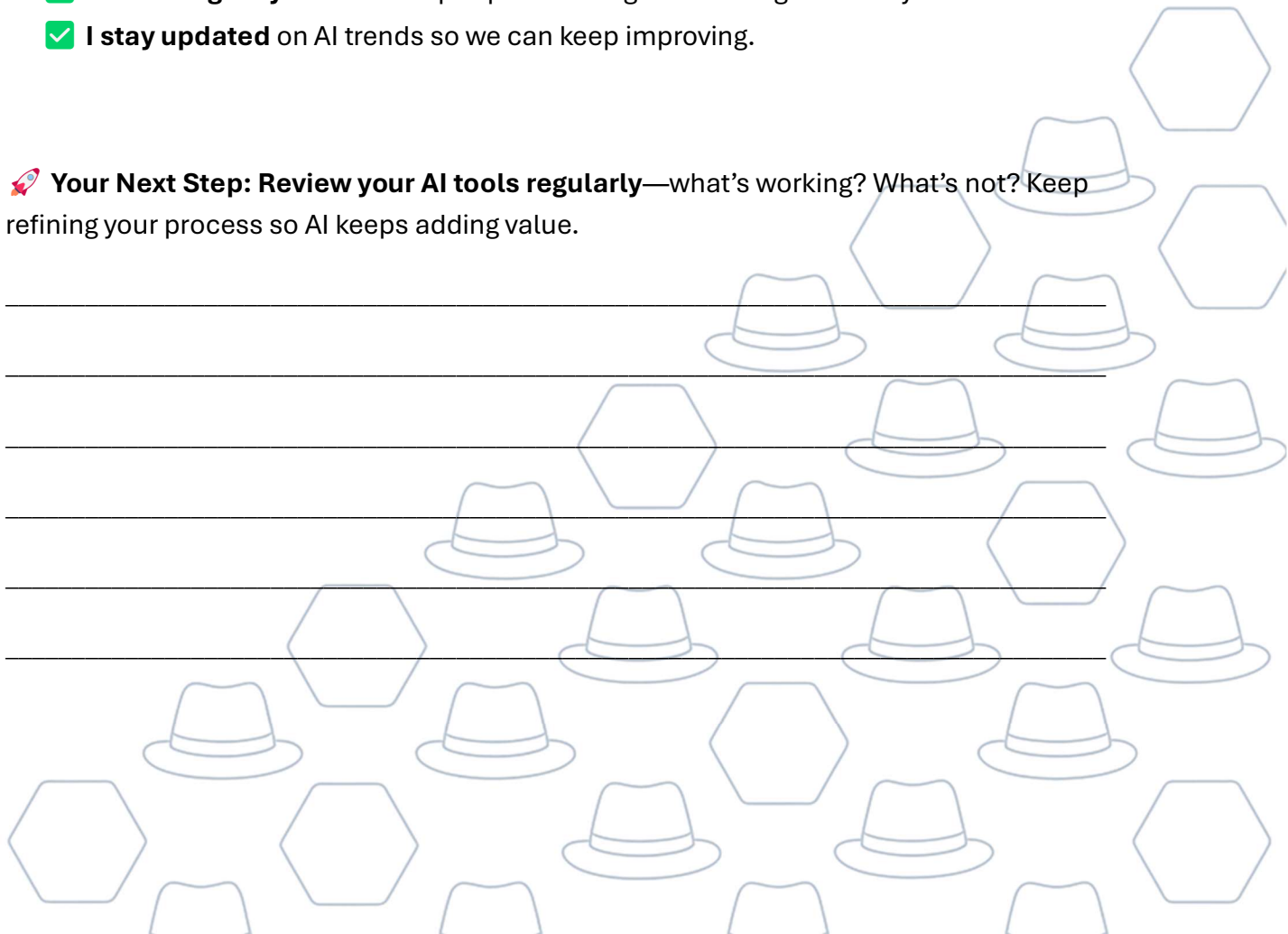
AI isn't just a tool in my business—it's part of how we operate. We use AI to streamline tasks, make better decisions, and free up our team for bigger things. Instead of debating whether AI is "worth it," we treat it like a necessary part of how we grow.

- ◆ **What I realized:** AI is never "done." It's something we keep refining, testing, and improving as we go.

What I did to move forward:

- ✓ **I set up a feedback loop** to measure how well AI is working for us.
- ✓ **I encourage my team** to keep experimenting and sharing what they learn.
- ✓ **I stay updated** on AI trends so we can keep improving.

 **Your Next Step: Review your AI tools regularly**—what's working? What's not? Keep refining your process so AI keeps adding value.



4.1 Measuring AI ROI

Return on Investment (ROI) doesn't have to be complicated. When it comes to AI, think in terms of **time, energy, quality, and value.**

Here are 4 dimensions of AI ROI for small businesses:

1. Time Saved

- How long did this task take before?
- How long does it take now using AI?

2. Quality Gained

- Are your emails clearer? Your visuals sharper? Your proposals more persuasive?

3. Creative Lift

- Does AI help you get unstuck, generate more ideas, or write faster?

4. Emotional Return

- Are you less stressed? More confident? Less buried in repetitive work?

Example ROI Tracker

Task	Old Time	New Time	Output Quality	Notes
Weekly Newsletter	2 hrs	30 min	Stronger subject lines	AI wrote the first draft
Job Description	90 min	25 min	More concise	AI helped format and tone

 *Tip: Even a 20-minute improvement per week can save you over **17 hours per year.** That's half a workweek.*

Try This:

Pick one task you now use AI for regularly.

Task:

[Write here]

Old time spent:

[Write here]

New time with AI:

[Write here]

What's better about the result?

[Write here]

How does it feel compared to before?

[Write here]

4.2 Shadow AI – Bottom-Up and Top-Down

Shadow AI is when employees or team members use AI tools on their own—without formal policies, training, or oversight. And it’s not a bad thing.

In fact, many of your best AI use cases will start from the bottom up.

But without guidance, Shadow AI can lead to:

- Inconsistent brand voice or messaging
- Use of unvetted tools that may risk data security
- Confusion about what’s “okay” or encouraged

Let’s talk about how to **leverage Shadow AI while also leading with strategy**.

Bottom-Up Approach: Start with Curiosity

Encourage your team to explore AI and talk about it. Then build from what’s already happening.

Start here:

- “What tools are you already using or curious about?”
- “What tasks do you wish were easier each week?”
- “Have you tried AI on anything recently that worked well?”

This creates an open, experimental culture—without fear or confusion.

Top-Down Approach: Set Direction, Not Control

Once you understand what’s happening on the ground, set some light structure.

Focus your leadership on:

- Identifying a few “approved” tools and use cases
- Offering team-wide prompt templates or GPTs
- Encouraging reflection and shared wins

AI Strategy Tip:

Let the frontline team tell you what works. Then give them guardrails, support, and structure—not restrictions.

Sample Prompt for Teams

“Let’s collect examples of how each person has used AI this month. What worked? What didn’t? What surprised you?”

Create a shared doc or Slack thread to gather feedback. This can evolve into a crowdsourced playbook.

Reflection Box

Where might Shadow AI already be happening in your team or workplace?

[Write here]

What’s one action you can take to support safe, smart experimentation?

[Write here]

What could your leadership team do to model AI use with clarity and intention?

[Write here]

4.3 Training Teams and Creating AI Policies

When your business moves from experimenting with AI to using it regularly, you'll need some shared understanding and expectations. This doesn't mean rules and red tape—it means clarity and trust.

You're not just teaching *how* to use AI—you're shaping *how to think with it*.

What to Train On

1. **AI Basics:** Definitions, use cases, and risks
2. **Prompting Skills:** How to ask better questions
3. **Tool Access:** What's available, what's approved
4. **Trust & Privacy:** What NOT to enter into AI tools
5. **Use Boundaries:** When to use AI—and when not to

Sample Topics for a Team Training Session

- How AI supports (not replaces) our roles
- Examples of good and bad prompts
- When we fact-check or edit AI results
- Sharing wins: AI that saved us time this month

Use workshops, “lunch and learns,” or one-on-one coaching to build a supportive learning culture.

Creating a Light AI Policy

You don't need a legal department. Just create a one-page document that answers these questions:

- What tools are allowed or recommended?
- What types of information are off-limits?
- What are some approved use cases?
- Where do we share ideas or questions?
- Who reviews or updates this guidance?

Sample Mini-Policy Language

“We encourage safe, thoughtful use of generative AI tools like ChatGPT for brainstorming, content drafts, and simple automations. Please do not enter personal customer data, passwords, or confidential financials into any AI tool. When in doubt, ask your manager or post in our AI feedback thread.”

Try This:

Draft a mini-AI use guide for your business:

Tool(s) we use or recommend:

[Write here]

Things we should never enter into AI:

[Write here]

Tasks where AI is encouraged:

[Write here]

Where we talk about AI wins or questions:

[Write here]

4.4 Strategic Planning & Long-Term Implementation

The final step in your AI journey isn't just about doing more—it's about doing it better, smarter, and with purpose.

Once AI becomes part of your systems, it's time to align it with your goals, values, and business strategy.

Where AI Can Support Strategic Thinking

- Planning: “Help me map out quarterly goals and KPIs.”
 - Forecasting: “What trends should I pay attention to in [industry]?”
 - Scenario Testing: “What are 3 ways this decision could go wrong, and how could I respond?”
 - Delegation: “Create a handoff checklist so someone else can run this task next month.”
-

AI + Vision Work

You can even use AI to support your big-picture leadership work:

- Draft your business mission and vision statements
- Break a long-term goal into 30/60/90 day sprints
- Get ideas on how to grow, hire, scale, or exit

Reflection Prompt

What's one strategic challenge I'm facing right now?

[Write here]

How might AI help me think through it more clearly?

[Write here]

What's one long-term use of AI I'd like to build into my business?

[Write here]

 *Final Thought: The best way to lead with AI is to keep learning from it—not as a boss, but as a partner. Use it to think sharper, not lazier. You’re not replacing your hats. You’re building better conversations around them.*

 Section 4 Complete: AI is now a part of how your business learns, grows, and moves forward.



Great Work – You're On Your Way

You've taken a big step toward smarter, more intentional AI use in your business. **What's Next?**



AI Resource Lab (West Central MN SBDC)

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<https://westcentralmnsbdc.com/ai-resources-lab>



Need Help? Work with an SBDC Advisor

This workbook is built for self-guided learning—but you don't have to go it alone.

Your local SBDC consultant is trained to support your AI learning, adoption, and implementation. Whether you want help building your first workflow, choosing a tool, or creating a policy—we're here to assist.

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