AI-Powered Marketing Workbook

For Small Business Owners & Entrepreneurs

West Central MN SBDC | AI Resource Lab

Take your marketing to the next level by collaborating with AI.
This workbook helps you define your business, identify your marketing needs, and prompt AI tools to generate real, customized strategies—designed just for you.

📸 **Just fill it out, snap a photo, and upload it to ChatGPT or any AI platform to begin!**

What You'll Find Inside

• Step-by-step business & marketing form
• Simple upload instructions
• Smart AI prompt for personalized marketing help
• Best practices for collaborating with AI
• *Bonus:* Tips & example questions to guide your chat

Basic Marketing Expert Chatbot Setup

📷 **Fill out this page, take a photo, and upload it to ChatGPT or any AI platform.** The AI will process this information to collaborate with you on marketing strategies tailored to your business.

Step 1: Business Information

Please review the following information about my business:

- **Business Name:** _____
- **What I Sell:** _____
- **Industry:** _____
- **Location (City/Region or Online):** _____
- **Target Customers:** _____
- **What Makes My Business Unique:** _____

Step 2: Marketing Needs

Here are the areas where I need help. (Check all that apply):

- ☐ Social media content
- ☐ Email campaigns
- ☐ Marketing plans
- ☐ Local advertising ideas
- ☐ Customer engagement strategies
- ☐ Other: _____

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Step 3: AI Processing Prompt – follow these instructions upon receiving this.

AI Processing Prompt

"I have uploaded a photo of my business information and marketing needs. Please follow these steps to help me create a customized marketing plan and content:

1. ***Learn About My Business:*** *Start by analyzing the information I provided. Ask me about my business history, what strategies I have tried in the past, and what is currently working or not working. Gather as much context as possible.*

2. ***Clarify and Refine:*** *If anything is unclear or incomplete, ask specific clarifying questions to deepen your understanding of my business and goals.*

3. ***Explore My Industry:*** *Provide an overview of marketing best practices and strategies specific to my industry or audience. Share relevant examples or trends.*

4. ***Brainstorm and Collaborate:*** *Suggest initial ideas or strategies for the tasks I selected. Continuously ask questions like:*
   - *"What outcomes are you hoping for?"*
   - *"Have you tried similar approaches before? If so, what happened?"*
   - *"What is your budget and timeline for this?"*

5. ***Develop Content Together:*** *After refining the strategy, create detailed examples or templates for the selected tasks (e.g., social media posts, email campaigns, etc.). Ask me for feedback to ensure they align with my vision.*

6. ***Iterate and Refine:*** *Work with me step-by-step to adjust and improve the outputs based on my feedback. Continuously check if the strategies and ideas feel actionable and realistic for my business.*

Focus on staying curious and gathering detailed insights about my business before making recommendations. The more you learn, the more tailored and valuable your outputs will be."

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Instructions for Upload

1. Complete the form on the first page.

2. Take a clear photo of the filled-out 2nd page AND the 3rd page. (Giving it both context, and prompt instructions defining it's role.)

3. Upload the photo to ChatGPT (or your AI platform) along with the **AI Processing Prompt** from Step 3. (feel free to customize)

4. You may also want to include a link to your website or share other info directly in your chat so the AI can get more familiar with your business.

5. Continue building, and begin collaborating with your AI-powered marketing assistant!

Tips for Using AI Effectively

- **Find Your Favorite AI App:** ChatGPT, Claude, Gemini, Perplexity, etc.

- **Share Context:** Upload your completed form, and let the AI know what you're working on.

- **Collaborate, Don't Delegate:** Work with the AI to refine ideas and strategies.

- **You Lead the Conversation, not AI:** Want to switch gears, change topics, or go back? Do it!

- **Take Your Time, or Not:** Go back, skip ahead, and tweak the process as needed.

- **Refine Continuously:** If the AI goes too fast or misses details, provide more info and refine the outputs. Correct it if something's not right?

- **Ask "What Else?"** Encourage the AI to think beyond initial suggestions.

- **Use the 80/20 Rule:** Focus on getting close to your goal, then add finishing touches yourself outside of the chatbot.

- **Keep Building:** Revisit the chat for updates, refinements, and reusability.

Example Questions to Collaborate with AI and Keep the Chat Fresh

Use these to start or guide the collaboration, or get unstuck:

- "What are some marketing best practices for my industry?"

- "Who should I target with my campaigns, and why?"

- "Can you create a social media post idea for my business?"

- "How can I turn this idea into a full campaign to drive sales?"

- "What's missing from this strategy?"