KEP AI Training, Wednesday May 14th

Case Study Activity

Part 1 – Put on your SBDC Consultant Hat (10 Minutes):
Below you'll find some information about a theoretical client. Work with your group to identify 5 ways the team could help the client. What are their needs, and where would you start? Who would you bring in from the SBDC team for advice? What outside entities would you engage? What is some of the key information you need before moving forward?
How can the SBDC help the client?

1. _____
2. _____
3. _____
4. _____
5. _____

Client information
Miguel Rodriguez owns Evergreen Home Services, a 3-year-old home maintenance and repair business with 5 team members (himself, 3 technicians, 1 part-time admin) in Anoka. The annual revenue is $375,000. The business has significant seasonal fluctuations.
-Miguel works 60+ hours weekly (50% service calls, 50% operations) and faces burnout
-Seasonal revenue fluctuations create cash flow challenges
-Considering service expansion (electrical or plumbing) but unsure which path to take
-Marketing relies mostly on word-of-mouth with increasing customer acquisition costs
-Current pricing structure may not be optimal (hourly rates and material markup)
Goals: Reduce workload, increase revenue to $500,000, stabilize cash flow, develop a scalable business model, and potentially open a second location in 3-5 years.

Part 2 – Try it out using AI (10 minutes)
- Select ONE specific way the SBDC can help the client from the case study
- Create a detailed AI prompt using techniques from today's training:
  - Include role, task, format and context
  - Consider advanced techniques (chain of thought, few-shot, etc.)
- Try your prompt in an AI tool. Iterate at least 3 times to improve results.
- Discuss the quality of the response and how you might improve it

Part 3 – Report Out (1 minute per group)
1. What task/way to help did your group focus on? _____
2. What prompt did you create? _____
_____
_____
_____
_____
_____
3. What surprised you about the AI's response?
4. What ONE lesson about prompt engineering did your group learn?