

The genie is out. Now put it to work.

A hands-on workbook for service business owners who want to cut through the AI noise, practice on real business tasks, and leave with a practical AI Action Map.

WORKSHOP

Delaware Area Chamber of Commerce

WORKSHOP FORMAT

A practical, hands-on session for service business owners.

SESSION FOCUS

AI tools, prompt structure, risk awareness, and a 30-day action plan.

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NAME**BUSINESS****WHAT THIS WORKBOOK IS FOR**

Less theory, more traction.

This is your working companion for the room. Use it to decode the language, match tools to real work, draft better prompts, and choose the first AI task worth testing this week.

- Know the language without drowning in jargon.
- See the main tools and when to use each.
- Practice on real tasks from your business.
- Know what needs to be true before you automate.

FOUNDARI POINT OF VIEW

AI is not the strategy. It is the leverage.

The businesses that win will not be the ones collecting the most tools. They will be the ones that redesign how work gets done.

START HERE

Today's promise.

You will leave with an AI Action Map. Not theory. Not hype. A practical way to start using AI in your business this week.

You will learn to:

- Know the language without getting buried in it.
- See what different AI tools are actually good for.
- Practice on real business tasks.
- Know what needs to be true before automating.

Today's agenda:

Grab something to eat.

Settle in, connect, and get oriented.

Why this moment matters.

See why AI is moving faster than most operating systems.

Buzzwords in 10 minutes.

Translate the key terms into plain English.

Meet the tools.

Match common tools to the jobs they are best suited for.

Three live demos.

Compare weak prompts with CLEAR rewrites across three real tasks.

Build your AI Action Map.

Choose three practical tasks to test after the workshop.

Risks and trust.

Set boundaries for data, vendors, accuracy, and human review.

Q&A and next steps.

Leave with a 30-day plan and a clear follow-up path.

AI on top of a broken process just amplifies the mess.

NOTES

QUICK REFERENCE

Workshop cliff notes.

Keep this page handy when the workshop starts moving. The goal is not to learn every tool. The goal is to pick the smallest useful stack for the work you need done.

Core idea

- AI is not the strategy. It is leverage.
- Good process gets faster. Broken process gets messier faster.
- The owner still defines the goal, standard, and line AI should not cross.

Risk filter

- Do not paste sensitive data into free tools.
- Ask what the tool is referencing vs. inferring.
- Verify anything client-facing, financial, legal, or operationally important.

Tool Links

Places to start when choosing or testing tools.

Prompt Template

A reusable CLEAR prompt structure for better AI output.

AI Action Map Template

The worksheet for turning ideas into three testable tasks.

Recording / Replay

Use the replay to revisit demos, examples, and next steps.

NOTES

SECTION 1

Why this moment matters.

AI is moving faster than most businesses are prepared to use it well. The advantage is not every tool. The advantage is knowing how to direct the work.

WHERE AI ALREADY SHOWS UP IN OUR BUSINESS:

WHERE WE ARE STILL GUESSING OR AVOIDING IT:

You are the master of
the lamp. AI is the genie.

The business owner still defines the goal, the standard, the customer promise, and the line AI should not cross.

NOTES

SECTION 2 | AI TERMS

Clear the smoke. Find the magic.

Ten terms. Plain English. No jargon.

AI

Software that can learn patterns and make decisions.

Machine Learning

Systems that learn from data instead of only manual rules.

Automation

Repetitive tasks handled without manual intervention.

Bots

Software that performs automated tasks, usually from a script.

AI Agents

Bots that can make decisions, use tools, and take actions.

Generative AI

AI that creates text, images, code, audio, or video.

LLMs

The text technology behind tools like ChatGPT and Claude.

API

Rules that let apps communicate and share data.

MCP

A standard for connecting AI models to external tools and data.

Markdown

Plain text formatting that is easy for people and AI to read.

CIRCLE THE THREE TERMS YOU MOST NEED YOUR TEAM TO UNDERSTAND.

NOTES

SECTION 3

Meet the tools.

The landscape matters. Choosing the right tool matters more.

Main platforms

- ChatGPT
- Claude
- Perplexity
- Codex / Cowork
- Gemini
- NotebookLM

Tool categories

- Marketing and sales growth
- Customer service and experience
- General purpose copilots
- Finance and bookkeeping
- HR, hiring, and training
- Admin, operations, and back office
- Integration and automation connections

TOOLS WE ALREADY USE OR HAVE ACCOUNTS FOR:

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TOOL FIT

Pick the right tool for the job.

Draft an email or document

ChatGPT or Claude

Research with sources

Use Perplexity

Analyze a long document

NotebookLM or Claude

Create a social graphic

Canva AI

Transcribe a meeting

Otter or Granola

Connect tools and trigger steps

Zapier or Make

Trust calibration

- Start where you can spot mistakes.
- Watch what it gets right and wrong.
- Ask what it is referencing vs. inferring.
- Verify anything important.

ONE PLACE I CAN SAFELY TEST AI THIS WEEK:

WHAT I NEED TO VERIFY BEFORE TRUSTING IT:

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WORKBOOK MOMENT

AI starting point.

Answer these before we build the Action Map.

WHAT TOOLS ARE WE CURRENTLY USING?

WHAT TASK IS MOST REPETITIVE OR TIME-CONSUMING?

HOW OFTEN ARE WE ACTUALLY USING THEM?

WHAT TASK DO I WISH SOMEONE ELSE COULD HANDLE?

NOTES

MARKET CONTEXT

By the numbers.

Use these points as context, not hype. The opportunity is real, but so is the gap between adoption and effective implementation.

75%

of businesses have adopted AI, but most are still using it in shallow, one-way ways.

85%

of SMBs using AI expect a return on investment.

87%

say AI helps them scale.

6-7 hours

of time per week can be freed up by AI agents, yet only a small share of businesses are using them today.

Adoption is rising fast. Effective operational use is still lagging. That gap is where the advantage lives.

NOTES

SECTION 4

Live demo notes.

Good AI work is direction, not magic. Watch the shift from a weak prompt to a usable output.

Demo scenarios

- Respond to a hard review.
- Clean up a messy customer list.
- Follow up after a proposal goes quiet.

SCENARIO SELECTED BY THE ROOM:

DIFFERENCE BETWEEN THE WEAK
PROMPT AND FIRST OUTPUT:

CLEAR REWRITE THAT IMPROVED THE ANSWER:

NOTES

SECTION 5 | ACTION MAP

Build your CLEAR prompt.

Context

Who you are and what your business does.

Language

The voice and tone to use.

Explicit

Instructions and desired format.

Audience

Who the output is for.

Refine

Treat the first output as a draft.

CONTEXT: MY BUSINESS, TASK, AND GOAL:**LANGUAGE: VOICE, TONE, AND EXAMPLES:****EXPLICIT: EXACT OUTPUT, CONSTRAINTS, AND FORMAT:****AUDIENCE: WHO THIS IS FOR AND WHAT THEY NEED:****REFINE: WHAT I WILL ASK AI TO IMPROVE:****NOTES**

Use AI to improve the prompt first.

Prompt engineering

Be specific. Give examples. Set constraints. Iterate. Ask for options.

Metaprompting

Ask AI to improve your prompt or ask you questions before it starts.

Context engineering

Give AI the background it needs: SOPs, service guides, FAQs, examples, and custom instructions.

REUSABLE PROMPT TEMPLATE I CAN BUILD FROM TODAY:

NOTES

ACTION MAP

My AI Action Map ideas.

Your three wishes: pick three useful tasks and choose one to test this week.

1. BIGGEST WEEKLY TIME SINK	CLEAR PROMPT DRAFT	HOW I WILL RATE THE OUTPUT
2. CLIENT COMMUNICATION TASK	CLEAR PROMPT DRAFT	HOW I WILL RATE THE OUTPUT
3. STRATEGIC OR PLANNING QUESTION	CLEAR PROMPT DRAFT	HOW I WILL RATE THE OUTPUT

NOTES

Debrief the prompt.

The first answer is only a draft. Use the debrief to learn what the tool needs next.

WHAT WORKED?

WHERE DID THE PROMPT FAIL?

WHAT SURPRISED ME?

WHAT CONTEXT WAS MISSING?

WHAT WAS USABLE RIGHT AWAY?

HOW WOULD I REFINES IT?

NOTES

SECTION 6

Risks, trust, and boundaries.

Useful AI needs boundaries.

Data privacy basics

- If you would not email it to a stranger, do not paste it into a free AI tool.
- Free tiers may use your data differently than business tiers.
- Never paste sensitive client data without a clear policy.
- Compliance-heavy industries need extra review.

When AI gets it wrong

- It can be confidently wrong.
- It may invent support or weak sources.
- Ask what it is referencing vs. inferring.
- Verify critical decisions.

Before buying “AI-powered” software

- What specifically does AI do that the software could not do before?
- Where does our data go?
- Can we try it before committing?

NOTES

SECURITY BASICS

Keep the lamp in safe hands.

AI makes good process faster, but it also makes weak security and unclear access rules more expensive.

Minimum guardrails

- Use business accounts and strong passwords.
- Do not share API keys in chats, docs, or screenshots.
- Be cautious with browser extensions and plug-ins.
- Watch for AI scams, impersonation, and deepfake phishing.

WHO IS ALLOWED TO USE AI TOOLS FOR WORK?

WHAT DATA SHOULD NEVER BE PASTED INTO AI?

WHO REVIEWS HIGH-RISK AI OUTPUT?

NOTES

FOUNDATION CHECK

Before you automate.

AI is an accelerant. Good process gets faster. Broken process gets messier faster.

IS THE PROCESS CLEAR ENOUGH TO EXPLAIN?

WHAT OPERATIONAL ISSUE SHOULD WE FIX FIRST?

ARE THE TOOLS CONNECTED OR STUCK IN ISLANDS?

WHAT SHOULD STILL REQUIRE A HUMAN DECISION?

IS THE DATA CLEAN ENOUGH TO TRUST?

NOTES

NEXT STEPS

My 30-day AI plan.

Start with one useful win. Use your AI Action Map and digital toolkit this week.

THIS WEEK: ONE TASK I WILL TEST

WEEK 2: WHAT I WILL REFINE OR REPEAT

WEEK 3: WHAT CONTEXT OR SOP I WILL ADD

WEEK 4: WHAT I WILL AUTOMATE OR SYSTEMIZE

The technology is the easy part. The thinking is the hard part.

NOTES

MODULE NOTES AND NEXT STEPS

Turn this into action.

Use these module labels to track the workshop flow, then decide what is worth testing, what needs a better process, and what should stay human-reviewed.

MODULE 1 & 2: BUZZWORDS, TOOLS, AND USEFUL EXAMPLES

**WHICH REPETITIVE TASK COSTS
US THE MOST TIME EVERY WEEK?**

MODULE 3: MY AI ACTION MAP IDEAS

**WHAT COULD WE TEST IN THE NEXT 7 DAYS
WITHOUT CREATING OPERATIONAL RISK?**

MODULE 4: RISKS, TRUST, AND BOUNDARIES

WHO NEEDS TO APPROVE OR REVIEW THE FIRST TEST?

NOTES

Keep building from here.

Foundari helps service businesses turn AI interest into useful systems. Everything starts with a Foundari Diagnostic.

AI & Automation

Practical AI workflows and automations.

Systems & Integration

Connected tools, cleaner process, Zoho-centered operations.

Strategy & Brand

Clearer positioning, customer experience, and growth systems.