PRACTICAL AI · NO HYPE

Your AI starter kit.

You don't need a dozen new subscriptions. Start with one good assistant, connect it to the work your team already does, and build from small, real wins.

Step 1 · Pick one AI assistant for the whole team

Match it to the tools you already live in. Use a **business or team plan** so you get admin controls and stronger data protections than personal accounts.

Microsoft 365 Copilot
Best if your team runs on Outlook, Teams, Word, and Excel. Works inside the apps you already use.

Gemini for Google Workspace
Best if you run on Gmail, Google Drive, Docs, and Sheets.

ChatGPT (Business)
A strong general-purpose assistant for writing, analysis, and brainstorming across any toolset.

Claude (Team)
Excellent for long documents, careful writing, contracts, and working through complex material.

Step 2 · Add tools by job, only where it hurts

THE JOB	WHERE TO START
Email & writing	Your assistant from Step 1: drafting replies, proposals, job descriptions, and policies. Save your best prompts as templates the team can reuse.
Meetings	Built-in AI notes in **Teams, Zoom, or Google Meet**, or a dedicated note-taker like **Fireflies** or **Otter** for summaries and action items.
Documents & research	Upload a contract, manual, or spec to your assistant and ask questions. **NotebookLM** and **Perplexity** are useful for research with sources.
Repetitive handoffs	Connect your apps with **Zapier**, **Make**, or **Power Automate**: new form → CRM record → follow-up email, without re-typing.
Marketing & design	**Canva**'s AI features for social posts, flyers, and quick presentations in your brand.
Customer questions	A website chat or FAQ assistant trained on *your* policies and services, with a clear handoff to a real person.

Step 3 · Five quick wins to try this week

1. **Turn on meeting summaries.** Record your next internal meeting and let AI draft the notes and action items.
2. **Draft your three most common emails.** Quote follow-ups, scheduling, "where's my order." Save them as reusable templates.
3. **Ask questions of a long document.** Upload an employee handbook or contract and ask, "What does this say about...?"
4. **Clean up a messy spreadsheet.** Have AI explain formulas, spot duplicates, or summarize trends.
5. **Write one standard operating procedure.** Talk through a process out loud, then let AI turn the transcript into a step-by-step SOP.

Step 4 · Protect your data

Do

- ✓ Use business/team plans with admin controls
- ✓ Check each vendor's data-use and retention settings
- ✓ Write a one-page AI use policy for your team
- ✓ Have a person review anything sent to customers

Don't

- ✗ Paste customer, employee, or health data into personal accounts
- ✗ Share passwords, bank info, or ID numbers with AI tools
- ✗ Publish AI-generated facts, figures, or legal language unchecked
- ✗ Let every employee pick their own tool with no oversight

Free places to keep learning

CT Small Business Development Center
Free, confidential advising for Connecticut businesses.
ctsbdc.uconn.edu

Vendor training
Free courses from Google (AI Essentials), Microsoft Learn, and Anthropic Academy.

NIST AI Risk Framework
A plain framework for thinking about AI risk and governance.
nist.gov/itl/ai-risk-management-framework

Want a plan built for your business?

In a one-hour AI consultation, we map your workflows, rank where AI can actually help, and leave you with a practical next-step plan. Virtual, or onsite in CT & western Mass.

Book at mmdsoftware.com/ai

$250
first hour · fee credited toward implementation