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# The AI Implementation Starter Kit

Everything you need to start using AI in your business

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# Chapter 1: Before You Start

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## Who This Kit Is For

This kit is for small business owners, operators, and marketing managers who keep hearing about AI but haven't had time to figure out where to start. You don't need to be technical. You don't need a big budget. You just need 30 minutes a day and a willingness to experiment.

Whether you run a law firm, a landscaping company, an e-commerce shop, or a restaurant, the principles in this kit apply to your business. We've seen businesses across every industry save 10 to 20 hours per week by implementing just two or three of the strategies in this guide.

## What AI Can and Can't Do for Your Business

Let's be honest about what AI does well and where it falls short.

### AI is great at:

- Drafting first versions of emails, social posts, and marketing copy
- Summarizing long documents, reviews, and meeting notes
- Generating ideas and outlines quickly
- Automating repetitive, rule-based tasks (scheduling, follow-ups, data entry)
- Answering common customer questions 24/7
- Analyzing patterns in data (reviews, survey responses, sales trends)

### AI is not great at:

- Making strategic business decisions for you
- Replacing genuine human relationships with customers
- Producing perfect content that never needs editing
- Understanding your specific brand voice without training
- Handling sensitive or emotionally complex customer situations
- Replacing expertise you don't have (it can assist, not substitute)

The businesses that get the most from AI treat it as a capable assistant, not a magic wand. You still need to review, edit, and direct the output. The time savings come from starting at 80% instead of 0%.

## How to Get the Most From This Kit

**1. Don't try everything at once.** Pick one use case from Chapter 2, implement it this week, and measure the results before adding another.

**2. Use the prompts in Chapter 4 as starting points.** Customize them with your business details, tone, and specific situation.

**3. Follow the 30-day calendar in Chapter 7.** It gives you a structured path so you don't get overwhelmed.

**4. Track your time savings.** Use the ROI worksheets in Chapter 8. Knowing your actual savings keeps you motivated and helps justify future investments.

***"The one thing that matters most: start small, measure, iterate. The businesses that win with AI aren't the ones who buy the fanciest tools. They're the ones who actually use what they have."***

# Chapter 2: The 10 Highest-ROI AI Use Cases for Small Businesses

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These are the ten use cases we see delivering the fastest, most measurable results for small businesses. They're ranked by a combination of time saved, ease of implementation, and impact on revenue.

## 1. Automated Customer Follow-Up

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**Time Saved:** 5+ hours/week | **Difficulty:** Easy

**What it is:** Set up automated email or text sequences that go out after a purchase, appointment, or inquiry. Instead of manually remembering to follow up, the system handles it.

**Why it matters:** Most businesses lose customers not because of bad service, but because they forget to follow up. Automation makes follow-up consistent and effortless.

**Real-world example:** A dental practice sends an automated thank-you email after each visit, a review request 48 hours later, and a recall reminder at 6 months. Before automation, their front desk spent 5 hours a week on these tasks manually.

**Recommended tool:** Mailchimp (\$13/mo), ActiveCampaign (\$29/mo), or Zapier + your existing email tool

## 2. Review Response Drafting

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**Time Saved:** 3 hours/week | **Difficulty:** Easy

**What it is:** Use AI to draft personalized responses to Google, Yelp, and Facebook reviews. You review and tweak before posting.

**Why it matters:** Responding to every review improves your local SEO ranking and shows potential customers you care. But writing unique responses is time-consuming.

**Real-world example:** A plumbing company gets 15 to 20 reviews per week. Using ChatGPT with a custom prompt, the owner drafts all responses in 20 minutes instead of 2 hours.

**Recommended tool:** ChatGPT (\$20/mo for Plus) or Claude (free tier works for this)

## 3. Social Media Content Generation

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**Time Saved:** 4 hours/week | **Difficulty:** Easy

**What it is:** Generate social media posts, captions, and content calendars using AI. You provide the topics and tone, AI handles the writing.

**Why it matters:** Consistency on social media matters more than perfection. AI helps you post regularly without spending hours writing.

**Real-world example:** A fitness studio generates a month of Instagram captions in one sitting. They provide 10 themes (member spotlights, tips, class promos) and AI creates 3 to 4 variations of each.

**Recommended tool:** ChatGPT (\$20/mo), Claude (free/\$20/mo), or Jasper (\$49/mo for marketing teams)

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## 4. Email Marketing Copy

**Time Saved:** 2 hours/week | **Difficulty:** Easy

**What it is:** Draft newsletters, promotional emails, and drip campaigns with AI. Feed it your offer details and audience, and it produces ready-to-edit copy.

**Why it matters:** Email consistently delivers the highest ROI of any marketing channel (roughly \$36 for every \$1 spent). But writing good emails takes time most small businesses don't have.

**Real-world example:** An accounting firm uses AI to draft a monthly newsletter with tax tips. What used to take 3 hours now takes 45 minutes including edits.

**Recommended tool:** ChatGPT or Claude for drafting, then paste into Mailchimp or ConvertKit

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## 5. Invoice and Payment Automation

**Time Saved:** 3 hours/week | **Difficulty:** Medium

**What it is:** Automate invoice creation, sending, payment reminders, and reconciliation. AI-powered bookkeeping tools can categorize expenses and flag anomalies.

**Why it matters:** Late payments and manual invoicing drain cash flow and time. Automation gets you paid faster.

**Real-world example:** A landscaping company switches from manual QuickBooks entries to automated invoicing through Jobber. Payment collection time drops from 21 days to 7 days average.

**Recommended tool:** QuickBooks Online (\$30/mo), FreshBooks (\$17/mo), or Xero (\$15/mo)

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## 6. Appointment Scheduling Automation

**Time Saved:** 2 hours/week | **Difficulty:** Easy

**What it is:** Let customers book, reschedule, and cancel appointments online. Automated reminders reduce no-shows.

**Why it matters:** Phone tag wastes everyone's time. Self-service scheduling converts more visitors into booked appointments.

**Real-world example:** A hair salon implementing Calendly reduces no-shows by 35% with automated text reminders and saves the receptionist 2 hours daily.

**Recommended tool:** Calendly (free/\$10/mo), Acuity (\$16/mo), or Square Appointments (free for individuals)

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## 7. Customer FAQ / Chatbot

**Time Saved:** 5 hours/week | **Difficulty:** Medium

**What it is:** Deploy an AI chatbot on your website that answers common questions, captures leads, and routes complex issues to your team.

**Why it matters:** 70% of customer questions are repetitive. A chatbot handles them instantly, 24/7, while your team focuses on complex issues.

**Real-world example:** An HVAC company adds a chatbot that answers questions about pricing, service areas, and scheduling. It captures 40% more leads after hours compared to a simple contact form.

**Recommended tool:** Tidio (\$29/mo), Intercom (\$39/mo), or Drift (free tier available)

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## 8. Competitive Intelligence Gathering

**Time Saved:** 2 hours/week | **Difficulty:** Medium

**What it is:** Use AI to monitor competitors' websites, social media, pricing changes, and review sentiment. Get summaries instead of doing manual research.

**Why it matters:** Knowing what your competitors are doing helps you differentiate and respond to market changes quickly.

**Real-world example:** A restaurant owner uses ChatGPT to analyze competitor menus and reviews weekly, identifying gaps in the local market (no one offers a good weekend brunch) that become a revenue opportunity.

**Recommended tool:** ChatGPT or Claude for analysis, Google Alerts (free) for monitoring

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## 9. Google Business Profile Optimization

**Time Saved:** One-time, high impact | **Difficulty:** Easy

**What it is:** Use AI to rewrite your Google Business Profile description, generate post ideas, craft responses to Q&A, and identify missing categories or attributes.

**Why it matters:** Your Google Business Profile is often the first thing potential customers see. An optimized profile gets more clicks, calls, and visits.

**Real-world example:** A personal injury law firm uses AI to rewrite their GBP description with location-specific keywords. Impressions increase 45% in the first month.

**Recommended tool:** ChatGPT or Claude (free for this task)

## 10. Internal Process Documentation

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**Time Saved:** One-time, saves onboarding time | **Difficulty:** Easy

**What it is:** Use AI to create SOPs (Standard Operating Procedures) for your recurring tasks. Describe the process conversationally, and AI structures it into a clear, step-by-step document.

**Why it matters:** Every business has processes trapped in one person's head. Documenting them means anyone can step in, and new hires get productive faster.

**Real-world example:** A property management company documents their tenant onboarding process with AI in 2 hours. Previously, training a new manager took 2 weeks of shadowing. Now it takes 3 days.

**Recommended tool:** ChatGPT or Claude (free), output into Google Docs or Notion

# Chapter 3: AI Tool Comparison Matrix

Below are side-by-side comparisons of the most popular tools in each category. Prices reflect the most common small-business tier as of early 2025. All prices are monthly.

## Content & Marketing

Tool	Best For	Price	Pros	Cons
ChatGPT (OpenAI)	General writing, brainstorming, analysis	Free / \$20/mo (Plus)	Versatile, huge plugin ecosystem, image generation	Can hallucinate facts, output can feel generic without good prompts
Claude (Anthropic)	Long-form content, nuanced writing, analysis	Free / \$20/mo (Pro)	Excellent at following instructions, large context window, thoughtful tone	Smaller plugin ecosystem, no native image generation
Jasper	Marketing teams, brand voice consistency	\$49/mo (Creator)	Brand voice training, templates for ads and emails, team collaboration	Expensive for solopreneurs, learning curve for setup
Copy.ai	Short-form copy, ads, product descriptions	Free / \$49/mo (Pro)	Fast for short copy, good templates, easy interface	Less effective for long-form, free tier is limited

## Workflow Automation

Tool	Best For	Price	Pros	Cons
Zapier	Connecting apps without code	Free / \$19.99/mo (Starter)	5,000+ integrations, easy setup, reliable	Gets expensive at scale, free tier limited to 100 tasks/mo
Make (Integromat)	Complex multi-step workflows	Free / \$9/mo (Core)	Visual workflow builder, powerful logic, cheaper than Zapier	Steeper learning curve, fewer native integrations
n8n	Self-hosted automation for technical teams	Free (self-hosted) / \$20/mo (cloud)	Open source, unlimited workflows, full data control	Requires technical setup, smaller community

## CRM & Sales

Tool	Best For	Price	Pros	Cons
HubSpot CRM	All-in-one marketing + sales	Free / \$20/mo (Starter)	Generous free tier, great email marketing, easy to learn	Gets expensive fast with add-ons, can feel bloated

Tool	Best For	Price	Pros	Cons
Salesforce Essentials	Growing teams that need power	\$25/user/mo	Industry standard, massive ecosystem, AI features (Einstein)	Complex setup, overkill for very small businesses
Pipedrive	Pipeline-focused sales teams	\$14/user/mo	Visual pipeline, simple interface, good mobile app	Limited marketing features, basic reporting on lower tiers

## Scheduling

Tool	Best For	Price	Pros	Cons
Calendly	Professional service bookings	Free / \$10/mo (Standard)	Clean interface, widely recognized, good integrations	Limited customization on free tier
Acuity Scheduling	Service businesses with complex needs	\$16/mo (Emerging)	Packages, intake forms, payment collection built in	Interface feels dated, owned by Squarespace
Square Appointments	Retail and beauty businesses	Free (individuals) / \$29/mo	Free for solo users, POS integration, client management	Limited features compared to dedicated tools

## Bookkeeping & Accounting

Tool	Best For	Price	Pros	Cons
QuickBooks Online	Most small businesses (US)	\$30/mo (Simple Start)	Industry standard, accountant-friendly, AI receipt scanning	Price increases regularly, customer support inconsistent
Xero	Businesses wanting clean UX	\$15/mo (Starter)	Beautiful interface, unlimited users, strong integrations	US payroll is add-on, smaller US accountant network
FreshBooks	Service-based freelancers	\$17/mo (Lite)	Best invoicing, time tracking, client portal	Limited inventory features, not ideal for product businesses

## Review Management

Tool	Best For	Price	Pros	Cons
Birdeye	Multi-location businesses	\$299/mo (Starter)	Review monitoring, response, and generation in one place	Expensive, long contracts, complex setup
Podium	Text-based customer communication	\$249/mo (Core)	Text-to-pay, webchat, review requests via text	Pricey, some features feel half-baked
GatherUp	Small businesses on a budget	\$60/mo (per location)	Affordable, review funnel, good reporting	Fewer integrations, less polished interface

***"Pro tip: Start with free tiers. Most tools offer enough functionality at the free level to test whether they work for your business before committing."***

# Chapter 4: 50+ Copy-Paste AI Prompts

These prompts are designed to work with ChatGPT, Claude, or any general-purpose AI tool. Replace the bracketed placeholders with your specific details. The more context you give, the better the output.

## Marketing Prompts

### Prompt 1:

Write a social media post promoting [specific offer] for my [business type] in [city]. Keep it under 150 words, use a friendly tone, and include a clear call to action.

### Prompt 2:

Draft a promotional email for [offer/sale/event] targeting [audience, e.g., past customers who haven't visited in 3 months]. Subject line should create urgency without being spammy. Keep the body under 200 words.

### Prompt 3:

Create 5 Google Business Profile post ideas for my [business type]. Each should highlight a different aspect: a seasonal promotion, a customer success story, a tip, a behind-the-scenes look, and a community involvement post.

### Prompt 4:

Write a blog post outline about [topic] for [target audience]. Include an attention-grabbing title, 5-7 subheadings, and 2-3 bullet points under each subheading describing what to cover.

### Prompt 5:

Generate 10 relevant hashtags for an Instagram post about [topic] in the [industry] space. Mix popular hashtags (100K+ posts) with niche ones (under 50K posts).

### Prompt 6:

Draft a response to this positive Google review from [customer name]: "[paste review]". Be genuine, mention something specific from their review, and subtly encourage them to return.

### Prompt 7:

Draft a professional, empathetic response to this negative review that mentions [specific issue]: "[paste review]". Acknowledge the problem, explain what you're doing about it, and invite them to contact you directly.

**Prompt 8:**

Write website hero section copy for a [business type] in [city]. Include a headline (under 10 words), subheadline (under 25 words), and a call-to-action button text. Focus on the main benefit to the customer.

**Prompt 9:**

Create 5 email subject lines for a [campaign type, e.g., spring sale, new service launch, holiday promotion]. Each should be under 50 characters and use a different psychological trigger (curiosity, urgency, benefit, social proof, exclusivity).

**Prompt 10:**

Write a 30-second elevator pitch for my business: [describe your business, who you serve, and what makes you different]. Make it conversational, not salesy.

## Customer Service Prompts

**Prompt 1:**

Draft a welcome email for new [business type] customers. Include a warm greeting, what to expect next, one helpful tip, and how to reach us if they need anything. Keep it under 150 words.

**Prompt 2:**

Write a follow-up email to send 3 days after [service/purchase]. Check on their satisfaction, offer a helpful tip related to what they bought, and ask if they have questions. Tone: warm and genuine, not pushy.

**Prompt 3:**

Create an appointment reminder template for [service type] that goes out 24 hours before. Include the date, time, location, what to bring or prepare, and how to reschedule. Keep it concise.

**Prompt 4:**

Draft a response to a customer complaint about [specific issue, e.g., delayed service, incorrect order, rude staff]. Acknowledge the problem, apologize without making excuses, explain the resolution, and offer something to make it right.

**Prompt 5:**

Write a re-engagement email for customers who haven't visited in [timeframe, e.g., 90 days]. Remind them what they're missing, offer an incentive to return, and make it easy to book. Don't be guilt-trippy.

**Prompt 6:**

Create a referral request email to send to happy customers. Explain why referrals matter to your business, make it easy (include a link or code), and offer a small thank-you incentive for both parties.

### Prompt 7:

Draft an FAQ answer for this common question: "[paste your most common customer question]". Keep the answer clear, concise, and helpful. End with a related tip or next step.

### Prompt 8:

Write a thank-you note for a customer who just hit [milestone, e.g., 1-year anniversary, 10th visit, first referral]. Make it personal and specific, not a generic template. Mention what their loyalty means.

### Prompt 9:

Create a professional out-of-office auto-reply for my [business type]. Include when I'll be back, who to contact for urgent matters, and a brief, friendly tone.

### Prompt 10:

Draft a price increase notification email for existing customers. Explain the reason honestly (rising costs, improved service), give them advance notice (at least 30 days), and emphasize the value they receive.

## Operations Prompts

### Prompt 1:

Create a standard operating procedure for [process, e.g., opening the store, processing a return, onboarding a new client]. Break it into numbered steps. Include who's responsible, common mistakes to avoid, and how long each step should take.

### Prompt 2:

Write an onboarding checklist for new [role] employees at my [business type]. Cover their first day, first week, and first month. Include training items, people to meet, systems to learn, and goals for each phase.

### Prompt 3:

Draft a vendor comparison analysis for [product/service]. Compare [Vendor A], [Vendor B], and [Vendor C] across these criteria: price, quality, reliability, customer support, and contract terms. Format as a table.

### Prompt 4:

Create a weekly team update template that covers: wins from this week, challenges encountered, priorities for next week, metrics to track, and any blockers that need help. Keep it scannable.

**Prompt 5:**

Write a project brief for [project description]. Include the objective, scope, timeline, budget, team members and roles, success metrics, and potential risks. Keep it to one page.

**Prompt 6:**

Draft a partnership outreach email to [company type, e.g., complementary local businesses]. Propose a specific collaboration idea, explain the mutual benefit, and suggest a low-commitment first step.

**Prompt 7:**

Create a customer feedback survey with 5 questions for my [business type]. Include a mix of rating scales and open-ended questions. Focus on actionable insights, not vanity metrics.

**Prompt 8:**

Write a job description for a [role] at my [business type]. Include the role summary, key responsibilities (5-7), qualifications, what makes this role unique, and compensation range. Tone: professional but human.

**Prompt 9:**

Draft a quarterly business review template. Sections: revenue summary, top wins, missed targets and why, customer feedback themes, competitive landscape changes, priorities for next quarter.

**Prompt 10:**

Create a meeting agenda template for a [meeting type, e.g., weekly team standup, client kickoff, quarterly planning]. Include time allocations, discussion items, decision points, and action item tracking.

## Sales Prompts

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**Prompt 1:**

Write a cold outreach email to [prospect type, e.g., local restaurant owners, SaaS companies with 10-50 employees]. Lead with a specific observation about their business, state the problem you solve, and suggest a brief call. Under 100 words.

**Prompt 2:**

Draft a follow-up email for a prospect who didn't respond to my initial outreach about [offer]. Don't be passive-aggressive. Add new value (a relevant insight or resource), and make the ask even easier.

**Prompt 3:**

Create a proposal template for [service type]. Include sections for: executive summary, understanding of their needs, proposed solution, timeline, investment (not "cost"), and next steps. Professional but warm.

#### **Prompt 4:**

Write responses to these common sales objections: "It's too expensive," "We're happy with our current provider," "We need to think about it," and "Can you send me more information?" Keep each response under 50 words.

#### **Prompt 5:**

Draft a quote or estimate email template for [service type]. Include a professional greeting, clear line-item breakdown, payment terms, validity period, and a confident (not pushy) call to action.

#### **Prompt 6:**

Create a case study outline from these project details: [describe the client, their problem, what you did, and the results]. Structure: Challenge, Solution, Results (with specific numbers), and Client Quote placeholder.

#### **Prompt 7:**

Write a testimonial request email to send after successfully completing [project/service]. Make it easy by providing 3 specific prompts they can respond to. Offer to draft it for their approval.

#### **Prompt 8:**

Draft a "we miss you" email for clients who haven't engaged in [timeframe]. Acknowledge the gap genuinely, share something new or valuable, and make reconnecting easy. No guilt trips.

#### **Prompt 9:**

Create a cross-sell email for customers who purchased [Product A] suggesting [Product B]. Explain why the two work well together with a specific use case. Include a limited-time offer.

#### **Prompt 10:**

Write a seasonal promotion email for [occasion, e.g., New Year, back-to-school, Small Business Saturday]. Include a compelling subject line, a clear offer, deadline, and single call-to-action.

## **Analysis Prompts**

#### **Prompt 1:**

Go to [competitor name]'s website at [URL] and analyze it. Identify 3 things they do better than us and 3 opportunities where we could differentiate. Be specific and actionable.

**Prompt 2:**

Here are our last 20 customer reviews: [paste reviews]. Identify the top 3 positive themes and top 3 areas for improvement. Rank by frequency and include direct quotes as evidence.

**Prompt 3:**

Suggest 5 specific, actionable ways to improve my [Google/Yelp] business listing based on this description: [paste current listing]. Focus on keywords, categories, photos, and posts.

**Prompt 4:**

Create a SWOT analysis for my business: [describe your business, market, and competitive situation]. Be brutally honest. For each weakness and threat, suggest one action to address it.

**Prompt 5:**

Here is my current pricing: [paste pricing details]. Analyze it against industry norms for [your industry]. Suggest specific optimizations including bundle opportunities and anchor pricing.

**Prompt 6:**

Compare my services to [competitor name]. Here's what we offer: [list]. Here's what they offer: [list or URL]. Identify our unique advantages and areas where we should consider expanding.

**Prompt 7:**

Review this email campaign: Subject: [subject]. Body: [paste body]. Suggest 3 improvements for subject line, 3 for body copy, and 1 for the call-to-action. Be specific about why.

**Prompt 8:**

Analyze my social media presence on [platform]. Here's my handle: [handle]. Based on my last 10 posts, recommend a content strategy including post frequency, content mix, and engagement tactics.

**Prompt 9:**

Create a detailed customer persona based on these data points: [demographics, behaviors, pain points, goals]. Give the persona a name and include a "day in the life" scenario.

**Prompt 10:**

Suggest 3 new revenue streams for my [business type] that align with my existing capabilities and customer base. For each, estimate startup effort, time to revenue, and revenue potential.

**Prompt 11:**

Analyze this job posting for my [role]: [paste posting]. Identify what's missing, what might discourage good candidates, and suggest improvements to attract better applicants.

# Chapter 5: Decision Framework Build vs. Buy vs. Hire

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Every time you identify a process that AI could improve, you face the same question: should you do it yourself with free tools, buy a specialized SaaS product, or hire someone to do it for you? Here's how to decide.

## Option 1: DIY with Free AI Tools

### Best when:

- The task is straightforward (drafting content, answering questions, brainstorming)
- You have 30 to 60 minutes per week to dedicate
- The output doesn't need to be perfect on the first try
- You're comfortable with copy-paste workflows
- Your volume is low (fewer than 20 tasks per week)

**Examples:** Writing social posts, drafting review responses, creating SOPs, brainstorming marketing ideas.

**Cost:** \$0 to \$20/month for ChatGPT Plus or Claude Pro.

## Option 2: Buy a SaaS Tool

### Best when:

- You need automation, not just AI-assisted drafting
- The task is recurring and rule-based (send this email when X happens)
- Volume is high enough that manual work isn't sustainable
- You need the tool to integrate with your existing systems
- Multiple team members need access

**Examples:** Email sequences (Mailchimp), scheduling (Calendly), chatbots (Tidio), review management (GatherUp).

**Cost:** \$10 to \$300/month depending on the tool and tier.

## Option 3: Hire an Expert

### Best when:

- The implementation is complex or requires custom work
- You need strategy, not just execution

- You've tried DIY and it's taking too long or producing poor results
- The stakes are high (customer-facing systems, complex workflows)
- You need ongoing optimization, not just setup

**Examples:** Custom CRM setup, complex automation workflows, AI chatbot training, comprehensive marketing strategy.

**Cost:** \$500 to \$5,000+ for project work; \$1,000 to \$5,000/month for ongoing services.

## Decision Matrix

Factor	DIY (Free Tools)	Buy (SaaS)	Hire (Expert)
Setup time	Minutes	Hours to days	Days to weeks
Monthly cost	\$0-20	\$10-300	\$1,000-5,000+
Technical skill needed	Low	Low to medium	None (they handle it)
Customization	High (but manual)	Medium	High
Scalability	Low	High	High
Maintenance	You	Vendor	Expert
Best for	Testing ideas	Proven processes	Complex or high-stakes

## Red Flags When Evaluating Vendors

- **Long-term contracts with no exit clause.** If they won't let you try month-to-month, they're worried about retention for a reason.
- **Proprietary data lock-in.** If you can't export your data, you're trapped. Always ask about data portability before signing.
- **Vague pricing.** If the website says 'Contact us for pricing,' expect enterprise-level costs. Get a clear quote in writing.
- **No customers in your industry.** Industry-specific experience matters. Ask for case studies or references from similar businesses.
- **Overpromising AI capabilities.** If they claim AI will 'run your business,' run away. Good vendors are honest about limitations.
- **No free trial or demo.** You should always be able to test before you commit.

# Chapter 6: Industry Quickstart Guides

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Each guide gives you the top three AI use cases for your industry, a recommended tool stack, and a specific action plan for your first week.

## Professional Services (Law, Accounting, Consulting)

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### Top 3 AI Use Cases:

- **Client follow-up automation.** Set up automated email sequences after consultations, filings, or project milestones. Clients feel informed without you manually checking in.
- **Document drafting and summarization.** Use AI to draft engagement letters, summarize case notes, create meeting prep documents, and produce client reports. Review everything before sending, but start at 80% instead of zero.
- **Content marketing for authority building.** Generate blog posts, LinkedIn articles, and newsletter content that positions you as the expert. AI handles the first draft; you add your expertise.

**Recommended Tool Stack:** ChatGPT or Claude (content), Clio or PracticePanther (legal CRM), Calendly (scheduling), Mailchimp (email sequences)

### First Week Action Plan:

Day 1: Audit your client communication. List every manual email you send repeatedly.

Day 2: Draft 5 email templates using AI (welcome, follow-up, check-in, referral ask, review request).

Day 3: Set up Calendly for client scheduling if you don't already have it.

Day 4: Use AI to write your first LinkedIn article or blog post on a topic you know well.

Day 5: Create an automated 3-email follow-up sequence for new client inquiries.

## Health & Wellness (Fitness, Medical, Therapy)

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### Top 3 AI Use Cases:

- **Appointment reminders and follow-ups.** Reduce no-shows with automated text and email reminders. Follow up after appointments to check on progress and encourage rebooking.
- **Patient/client education content.** Use AI to create exercise guides, nutrition tips, wellness newsletters, and post-treatment care instructions. Customize for different conditions or fitness levels.

- **Review generation and response.** Health and wellness businesses live and die by reviews. Automate the ask and use AI to draft thoughtful, HIPAA-compliant responses.

**Recommended Tool Stack:** Jane App or Mindbody (scheduling/CRM), ChatGPT (content), Mailchimp (email), GatherUp (reviews)

### First Week Action Plan:

Day 1: Map your patient/client journey from first contact to follow-up.

Day 2: Set up automated appointment reminders (24-hour and 2-hour).

Day 3: Draft 5 educational content pieces for your most common conditions or goals.

Day 4: Create a post-appointment follow-up email template.

Day 5: Set up an automated review request that goes out 2 hours after appointments.

## Home Services (HVAC, Plumbing, Electrical, Landscaping)

### Top 3 AI Use Cases:

- **Lead follow-up speed.** The first company to respond to an inquiry wins the job 78% of the time. Automate instant responses to web form submissions and missed calls.

- **Review management.** Home service businesses rely heavily on Google reviews. Automate review requests after completed jobs and use AI to draft responses.

- **Estimate and proposal generation.** Use AI to create professional, detailed estimates from your notes. Turn 'replace water heater, 50 gal' into a full proposal in minutes.

**Recommended Tool Stack:** Jobber or Housecall Pro (field service CRM), ChatGPT (proposals/content), Zapier (automation), Podium or GatherUp (reviews)

### First Week Action Plan:

Day 1: Set up instant auto-response for all web form inquiries (even a simple 'Got it, we'll call you within the hour').

Day 2: Create 3 estimate templates using AI for your most common services.

Day 3: Set up automated review requests after job completion.

Day 4: Use AI to rewrite your Google Business Profile description with local keywords.

Day 5: Create a seasonal maintenance reminder email for past customers.

## Food & Hospitality (Restaurants, Cafes, Catering)

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### Top 3 AI Use Cases:

- **Social media content.** Food businesses need constant visual and written content. Use AI to generate captions, daily specials posts, event promotions, and behind-the-scenes content ideas.
- **Review response management.** Restaurants get more reviews than almost any other business type. AI helps you respond to every single one without it consuming your evening.
- **Menu optimization and descriptions.** Use AI to write compelling menu descriptions, analyze which items to promote, and create seasonal menu concepts.

**Recommended Tool Stack:** ChatGPT or Claude (content/menus), Toast or Square (POS), Mailchimp (email marketing), Yelp for Business (review management)

### First Week Action Plan:

Day 1: Generate a month of social media captions for daily specials, events, and behind-the-scenes posts.

Day 2: Rewrite your top 10 menu item descriptions to be more appealing and specific.

Day 3: Respond to all pending Google and Yelp reviews using AI-drafted responses.

Day 4: Create an email capture strategy (offer a free appetizer for email signup).

Day 5: Draft your first monthly email newsletter: upcoming events, new menu items, a recipe or tip.

## Retail & E-commerce

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### Top 3 AI Use Cases:

- **Product descriptions at scale.** If you have dozens or hundreds of products, AI can generate unique, SEO-friendly descriptions from basic specs. This alone can save days of work.
- **Abandoned cart and post-purchase email sequences.** Automated emails recover lost sales and encourage repeat purchases. AI writes the copy; automation sends it at the right time.
- **Customer service chatbot.** Handle order status inquiries, return questions, sizing guides, and product recommendations automatically.

**Recommended Tool Stack:** ChatGPT or Jasper (product copy), Klaviyo or Mailchimp (email automation), Tidio or Gorgias (chatbot/support), Shopify or WooCommerce (platform)

### First Week Action Plan:

Day 1: Identify your 20 best-selling products. Use AI to rewrite their descriptions.

Day 2: Set up a 3-email abandoned cart sequence (1 hour, 24 hours, 72 hours after abandonment).

Day 3: Create a post-purchase email sequence (thank you, how-to-use, review request, cross-sell).

Day 4: Draft responses for your 10 most common customer service questions.

Day 5: Set up a basic chatbot to handle order status and return policy questions.

## Beauty & Personal Care (Salons, Spas)

### Top 3 AI Use Cases:

- **Appointment booking and reminders.** Online booking reduces phone calls and no-shows. Automated reminders keep your chair full.
- **Social media content.** Before/after photos are your best marketing. AI helps you write the captions, create content calendars, and stay consistent.
- **Client retention campaigns.** Automated emails for birthdays, appointment anniversaries, and rebooking reminders keep clients coming back.

**Recommended Tool Stack:** GlossGenius or Boulevard (salon CRM), ChatGPT (content), Mailchimp (email), Canva (graphics)

### First Week Action Plan:

Day 1: Set up online booking if you haven't already. Enable automated reminders.

Day 2: Create a month of Instagram captions for before/after posts, styling tips, and product features.

Day 3: Set up automated birthday emails with a discount offer.

Day 4: Create a rebooking reminder that goes out when clients are 2 weeks past their typical appointment interval.

Day 5: Use AI to rewrite your Google Business Profile and website bio to better reflect your specialty and personality.

# Chapter 7: The 30-Day Implementation Calendar

This calendar gives you a realistic, week-by-week plan for implementing AI in your business. Each day requires 30 to 60 minutes. Don't skip ahead. The sequence matters.

## Month at a Glance

Week	Theme	Goal
Week 1	Audit & Foundations	Understand where AI fits, set up your first tool
Week 2	Content & Communication	Start generating content and automating messages
Week 3	Automation & Workflows	Connect tools, automate your first process
Week 4	Measure & Scale	Review results, optimize, plan what's next

## Week 1: Audit & Foundations

### Day 1: Time Audit

Write down every recurring task you or your team does each week. Note how long each takes and how often it happens. This is your baseline.

### Day 2: Identify Quick Wins

Review your list from Day 1. Circle the 3 tasks that are most repetitive and least complex. These are your quick wins. Match them to use cases in Chapter 2.

### Day 3: Choose Your First Tool

Based on your quick wins, pick one tool to start with. Don't overthink it. Sign up for a free account. We recommend starting with ChatGPT or Claude since they're free and versatile.

### Day 4: Learn the Basics

Spend 30 minutes using your chosen tool. Try 5 prompts from Chapter 4. Notice what works and what needs tweaking. Save your best prompts.

### Day 5: Create Your First Asset

Use AI to create something you actually need this week: a social post, an email, a process document, or a review response. Time yourself. Compare to how long it usually takes.

### Day 6: Optimize Your Profile

Use the Google Business Profile prompts from Chapter 4 to audit and improve your listing. This is a one-time task with long-term impact.

### Day 7: Week 1 Review

What worked? What felt awkward? What saved the most time? Write down 3 takeaways. Decide which task you'll focus on automating in Week 2.

## Week 2: Content & Communication

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### Day 8: Batch Content Creation

Use AI to generate a full week of social media posts. Create 5 to 7 posts, each with a different angle. Edit for your voice. Schedule them using your platform's built-in scheduler.

### Day 9: Email Template Library

Create 5 email templates you use regularly: welcome email, follow-up, appointment reminder, review request, and a promotional email. Save them where your team can access them.

### Day 10: Review Response System

Draft responses for your 10 most recent reviews. Create a reusable prompt that includes your business name, tone guidelines, and response structure. Aim to respond to all reviews within 48 hours going forward.

### Day 11: Newsletter Draft

Use AI to draft your next newsletter or email blast. Include 3 sections: a main topic, a quick tip, and a call to action. Edit for accuracy and tone.

### Day 12: Content Calendar

Plan the next month of content. Use AI to generate 20 content ideas organized by theme (educational, promotional, behind-the-scenes, community). Assign dates.

### Day 13: Customer Communication Audit

Review every automated message your business sends (confirmations, reminders, receipts). Rewrite any that sound robotic or generic.

### Day 14: Week 2 Review

Calculate time saved so far. Compare the quality of AI-assisted content to what you were producing before. Identify any outputs that need more human editing.

## Week 3: Automation & Workflows

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### Day 15: Map Your First Workflow

Pick one process that involves multiple steps (like lead follow-up: receive inquiry, send confirmation, schedule call, send prep email). Map every step on paper.

### Day 16: Set Up Automation

Using Zapier, Make, or your CRM's built-in automations, build the workflow you mapped yesterday. Start simple: automate just the first 2 steps.

### Day 17: Test and Refine

Run your automation 5 times with test data. Check every output. Fix anything that looks wrong. Add error handling (what happens if an email bounces?).

### Day 18: Automate Review Requests

Set up an automatic review request that goes out after every completed job or purchase. Time it for 2 to 48 hours after the interaction, depending on your business.

### Day 19: Build a Follow-Up Sequence

Create a 3-email follow-up sequence for new leads who don't respond. Space them 3 days, 7 days, and 14 days apart. Each should add new value, not just say 'checking in.'

### Day 20: Connect Your Tools

Review your tool stack. Identify 2 tools that should talk to each other but don't. Use Zapier or Make to connect them. Example: new Calendly booking creates a HubSpot contact.

### Day 21: Week 3 Review

How many hours did automation save this week? Are there any workflows that broke or need adjustment? Identify your next automation target.

## Week 4: Measure & Scale

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### Day 22: Calculate Your ROI

Use the worksheets in Chapter 8. Calculate actual time saved per week, multiply by your hourly rate, and subtract tool costs. This is your real ROI.

### Day 23: Quality Check

Review everything AI has produced this month. Is the quality consistent? Are there patterns in what you edit? Create a 'style guide' prompt that addresses common issues.

### **Day 24: Team Training**

If you have a team, spend 30 minutes showing them what you've built. Walk through the prompts, templates, and automations. Get their input on what else to automate.

### **Day 25: Optimize Top Performers**

Look at which AI-generated content or automations performed best (highest open rates, most engagement, fewest edits needed). Double down on those.

### **Day 26: Plan Next Month**

Based on your results, choose 2 to 3 new use cases to implement next month. Use the decision framework in Chapter 5 to decide whether to DIY, buy, or hire.

### **Day 27: Documentation Day**

Document everything you've set up: tools, logins, workflows, prompt templates. If you got hit by a bus tomorrow, could someone else maintain these systems?

### **Day 28: Competitive Analysis**

Use the analysis prompts from Chapter 4 to study your top 3 competitors. Identify one thing they're doing that you should start, and one thing you do better that you should promote.

### **Day 29: Customer Feedback**

Ask 5 customers or clients for feedback on any changes they've noticed (faster responses, better content, easier booking). Real feedback beats assumptions.

### **Day 30: Monthly Review & Celebration**

Total time saved. Total cost of tools. Net ROI. Write down your top 3 wins and your plan for Month 2. You've built a foundation. Now it compounds.

***"Remember: consistency beats intensity. Thirty minutes a day for 30 days beats a weekend marathon. Show up every day, even when it feels small."***

# Chapter 8: ROI Calculator Worksheets

Use these worksheets to calculate the actual return on investment from your AI implementations. Fill one out for each task you've automated or improved with AI. Be honest with your numbers—the goal is clarity, not justification.

## Worksheet 1: Per-Task ROI Calculator

Task name: \_\_\_\_\_

Hours spent on this task per week (before AI): \_\_\_\_\_ hours

Hours spent on this task per week (after AI): \_\_\_\_\_ hours

Hours saved per week: \_\_\_\_\_ hours

Your effective hourly rate: \$ \_\_\_\_\_/hour

Weekly savings (hours saved x hourly rate): \$ \_\_\_\_\_

Monthly savings (weekly savings x 4.3): \$ \_\_\_\_\_

Annual savings (monthly savings x 12): \$ \_\_\_\_\_

Monthly tool cost: \$ \_\_\_\_\_/month

Annual tool cost (monthly x 12): \$ \_\_\_\_\_/year

Net annual savings (annual savings - annual tool cost): \$ \_\_\_\_\_

ROI ((net savings / tool cost) x 100): \_\_\_\_\_ %

## Worksheet 2: Monthly Savings Summary

Task	Hours Saved/Week	Tool Cost/Month	Net Savings/Month
1. _____	_____	\$ _____	\$ _____

Task	Hours Saved/Week	Tool Cost/Month	Net Savings/Month
2. _____	_____	\$ _____	\$ _____
3. _____	_____	\$ _____	\$ _____
4. _____	_____	\$ _____	\$ _____
5. _____	_____	\$ _____	\$ _____
TOTAL	_____	\$ _____	\$ _____

### Quick Reference: Common Time Savings

Based on data from businesses we've worked with, here are typical time savings you can expect:

Task	Before AI	After AI	Typical Savings
Review responses (per review)	10-15 min	2-3 min	~80%
Social media post (with caption)	30-45 min	10-15 min	~65%
Email newsletter	2-3 hours	45-60 min	~60%
Customer follow-up email	10-15 min	3-5 min	~70%
SOP documentation (per process)	3-4 hours	1-1.5 hours	~60%
Proposal/estimate drafting	45-60 min	15-20 min	~65%
Job description writing	1-2 hours	20-30 min	~70%
Meeting agenda creation	15-20 min	5 min	~75%

# Chapter 9: Vendor Evaluation Framework

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Before you commit to any AI tool or service provider, run them through this checklist. Not every question applies to every vendor, but the more boxes you can check, the better.

## The Essential Evaluation Checklist

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### Functionality & Fit

- Does it solve your specific problem, or is it a solution looking for one?
- Can you test it with your actual data and workflows before committing?
- Does it integrate with the tools you already use (CRM, email, calendar, POS)?
- Is there a mobile app or mobile-friendly interface? (Critical for service businesses)
- Do they have customers in your specific industry? Can you talk to one?

### Cost & Contracts

- What's the real total cost? Include setup fees, training, add-ons, and per-user charges.
- Is there a free trial? How long? Is it a real trial or a limited demo?
- What's the contract length? Can you go month-to-month?
- What happens to your data and workflows if you cancel?
- Are there hidden costs for features you'll need later (reporting, API access, extra users)?

### Data & Security

- Can you export all your data at any time? In what format?
- Where is your data stored? Is it encrypted?
- Do they comply with relevant regulations (HIPAA, GDPR, SOC 2) if applicable to your business?
- Who owns the content you create with the tool?
- What happens to your data if the company shuts down?

### Support & Reliability

- What does their support look like? Email only? Chat? Phone? What hours?
- What's their typical response time? Check recent reviews, not just their claim.
- Is there a knowledge base or documentation you can reference?
- What's their uptime track record? Check status page history.
- Do they have an active user community or forum?

### Scalability & Growth

- Will this tool still work when your business is 3x its current size?
- Can you add team members without a major price jump?
- Is there a clear upgrade path as your needs grow?
- Do they regularly ship new features? Check their changelog or blog.
- Is the company financially stable? (Check funding, leadership, reviews for signs of trouble)

## Vendor Comparison Scorecard

Rate each vendor 1 to 5 on these criteria. The highest total score wins, but don't ignore any category where a vendor scores below 3.

Criteria	Weight	Vendor A (___)	Vendor B (___)	Vendor C (___)
Solves my problem	x3	___ / 5	___ / 5	___ / 5
Ease of use	x2	___ / 5	___ / 5	___ / 5
Integration with my tools	x2	___ / 5	___ / 5	___ / 5
Price/value	x2	___ / 5	___ / 5	___ / 5
Customer support	x1	___ / 5	___ / 5	___ / 5
Data portability	x1	___ / 5	___ / 5	___ / 5
Industry experience	x1	___ / 5	___ / 5	___ / 5
Contract flexibility	x1	___ / 5	___ / 5	___ / 5
WEIGHTED TOTAL		___ / 65	___ / 65	___ / 65

***"The best tool is the one you'll actually use. A 'B+' tool that your team adopts beats an 'A+' tool that collects dust."***

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