SMALL BUSINESS • QUICK GUIDE

Know Your AI

Start with one task. Give clear directions. Review the result.

Start with one useful task

Marketing
Draft an email, improve a product description or turn one idea into several social posts.

Operations
Build an opening checklist, organize notes or draft a standard procedure.

Customer service
Create FAQs or draft a reply to a customer question.

Planning
Compare options, identify missing information or prepare questions for your advisor.

Financial understanding
Explain a term or help review an anonymized spreadsheet. Check every calculation and assumption.

TRY THIS

"I own a Vermont bakery. **Write 3 Facebook posts** for local families about our Saturday breakfast sandwiches. **Use a friendly tone**, keep each **under 75 words** and use only these facts: [hours, menu, price]."

Refine Your Prompt: Shorter. Simpler. Give me another option.

VtSBDC
VERMONT SMALL BUSINESS DEVELOPMENT CENTER

www.vtsbdc.org

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Use AI with care

Check the answer. Protect your information. Keep a person in charge.

1 Before you enter or upload information

- Use sample or anonymized information whenever possible. Remove customer names, employee details, account numbers and other identifiers.
- Do not enter passwords, payment card details, Social Security numbers or confidential client information.
- Check the tool's privacy settings, data use policy and your organization's rules. Personal and business plans may handle data differently.

For ChatGPT, Data Controls let you manage whether conversations help improve models. Turning off training does not replace your responsibility to protect confidential information.

2 Before you use an answer

- **Verify facts:** AI can invent numbers, quotations, references and sources. Open source links and confirm that they support the claim.
- **Check freshness:** For prices, laws, grants and current events, ask for current sources and dates. Confirm details with the original organization.
- **Check numbers:** Recalculate totals and percentages. Separate your actual results from estimates and assumptions.
- **Review fit:** Does the answer reflect your business, customers, budget and capacity?
- **Review content:** Check accuracy, tone, permissions and brand consistency before using text or images publicly.

3 When AI can take actions

Some AI tools can work across files or connected services. Understand what access you are granting. Review messages, purchases, bookings and changes before allowing the tool to carry them out.

Tools to explore

ChatGPT · Claude · Google Gemini · Microsoft Copilot · Perplexity

Prompts you can put to work

Replace the brackets with your own details. Use anonymized information.

1 Marketing with a limited budget

“I run a [business type] in [town]. My customers are [audience]. Suggest five marketing actions I can do this month with a budget of [$ amount] and [hours] per week. Include the first step and a simple way to measure each action. Ask for missing information before making recommendations.”

2 A repeatable business checklist

“Create a [daily opening / closing / inventory] checklist for my [business type]. We have [number] employees. Use these steps: [steps]. Group tasks in a practical order. Mark suggested additions for my review and do not invent safety requirements.”

3 A customer email

“Draft a friendly reply to this anonymized customer question: [question]. Use only our policy below: [policy]. Keep it under 120 words. If the policy does not answer the question, flag the gap rather than promise a solution.”

4 Understand your financial results

“Using this anonymized monthly P&L, summarize changes in sales, cost of goods sold and expenses. Show the calculations behind percentages. Separate facts from possible explanations. List five questions to discuss with my business advisor. Do not invent missing numbers.”

5 Research a business question

“Find current information on [topic] for a small business in [location]. Prefer original sources and provide links and dates. Separate verified facts from estimates. Tell me what you could not confirm.”

6 Turn notes into next steps

“Turn these notes into an action list: [notes]. Include task, person responsible and due date only when supplied. Mark missing details as ‘to be decided.’ Identify the three items that appear most urgent and explain why.”

Remember: AI is a tool.
You are the expert on your business and your customers.