RANKLEY

THE SMALL BUSINESS AI PLAYBOOK

30-Day AI Starter Worksheet

One practical workflow. Four weeks. A clear decision.

A printable companion to AI for Small Business

THE FOUR-WEEK PATH

WEEK 01	WEEK 02	WEEK 03	WEEK 04
CHOOSE	**TEST**	**BUILD**	**MEASURE**
One task	Three trials	A repeatable process	A clear decision

YOUR WORKSHEET DETAILS

Business / organization _____

Workflow owner _____

Start date _____

Review date _____

BEFORE YOU BEGIN

Choose a low-risk task. Test with fictional or approved non-sensitive information.
Never record passwords, payment details, or customer identifiers here.

OVERVIEW / START HERE

Your 30-day roadmap

Follow the activities, then use the corresponding weekly worksheet.

WEEK 01 **CHOOSE** One task + baseline	Days 1-2	List three to five recurring business tasks
	Days 3-4	Select one low-risk opportunity
	Days 5-6	Record the current time and corrections
	Day 7	Define the result you want to achieve
WEEK 02 **TEST** A tested prompt	Days 8-9	Choose an approved AI tool
	Days 10-11	Write and improve a reusable prompt
	Days 12-13	Run three controlled tests
	Day 14	Compare time, quality, and corrections
WEEK 03 **BUILD** A repeatable process	Days 15-16	Write down the workflow steps
	Days 17-18	Practice the procedure with its user
	Days 19-20	Run a small human-reviewed pilot
	Day 21	Review feedback and fix unclear steps
WEEK 04 **MEASURE** A clear decision	Days 22-25	Record time, quality, and costs
	Days 26-27	Compare with the starting point
	Day 28	Check information safeguards
	Days 29-30	Decide: keep, improve, or stop

This is a flexible schedule. The milestone and review matter more than exact dates.

WEEK 1 / DAYS 1-7

Choose one useful task

Find a repeatable, low-risk task and measure the current process.

1 List the work worth improving

Consider activities you do often, that take time, and that you can check easily.

TASK	TIMES / WEEK	MIN / TASK	EASY TO CHECK?	LOW RISK?

2 Select one task

Task I will test

Why I chose it

3 Record the starting point

Complete the task normally three times, including any review and corrections.

TRIAL	TOTAL TIME BEFORE AI	CORRECTIONS / PROBLEMS

Average minutes per task

What a good result looks like

WEEK 1 CHECKPOINT / One task, a baseline, and a measurable improvement goal.

WEEK 2 / DAYS 8-14

Test a suitable AI tool

Write a useful prompt, check safeguards, and run three trials.

1 Choose the tool and check information safety

Approved tool / account

Cost or plan

- [ ] Account settings reviewed
- [ ] Only approved information used
- [ ] Human approval required
- [ ] No automatic sending or changes

2 Build the five-part prompt

Use short notes here. Save the full reusable prompt in an approved workspace.

TASK	What should AI do?
CONTEXT	What does it need to know?
CONSTRAINTS	What must it avoid?
FORMAT	What should it look like?
REVIEW	What should it flag or ask?

3 Run three realistic tests

Include preparation, prompting, reviewing, correcting, and completion time.

TRIAL	TOTAL TIME WITH AI	CORRECTIONS NEEDED	ACCEPTABLE?

What worked / what needs improvement

WEEK 3 / DAYS 15-21

Build a repeatable process

Turn a useful test into a documented, human-approved workflow.

1 Define the trigger and inputs

When should this workflow begin?

Which approved information is needed?

2 Write the steps

Use the same procedure each time. Make review and approval explicit.

1

2

3

4

5

6

3 Review and approval

- [ ] Facts verified
- [ ] Company policy followed
- [ ] No invented promises
- [ ] Sensitive data handled correctly

Who approves the final action?

WEEK 3 CHECKPOINT / A documented process with a clear review owner.

WEEK 4 / DAYS 22-30

Measure and decide

Compare quality, time, corrections, and cost with your starting point.

1 Record the full results

Measure setup, AI use, review, corrections, and completion - not generation time alone.

MEASURE	BEFORE AI	WITH AI
Average minutes per task		
Number of corrections		
Quality / consistency		
Estimated tasks each month		
Monthly software / process cost		

Minutes saved / task = before - after
Estimated monthly hours = minutes saved x task volume / 60

2 Evaluate the outcome

Did output quality meet your original standard?

What new errors, risks, or delays appeared?

Was the improvement worth the cost?

3 Choose the next action

- ☐ KEEP — Consistent benefit
- ☐ IMPROVE — Promising, needs changes
- ☐ STOP — Not worthwhile

BONUS / REUSABLE TEMPLATE

My reusable prompt card

Keep one blank copy for each AI-assisted business task.

1 Describe the assignment

TASK What exact work should be prepared?

CONTEXT Which verified business facts are necessary?

CONSTRAINTS What should AI not invent, decide, or change?

FORMAT Email, table, checklist, outline, or another format?

REVIEW What must be checked, corrected, or escalated?

2 Final check before use

- [ ] Accurate and complete
- [ ] No unsupported claims
- [ ] Authorized information only
- [ ] Correct person approved it

Suggested instruction: If a key detail is missing, ask before preparing the result.