



STUDENT WORKBOOK

AI for Growing Businesses (Owners and Teams)

7 days, 3 hours a day · Online across India, in person from Jaipur



AI Coaching India

This workbook belongs to _____

Batch code: _____

AI for Growing Businesses (Owners and Teams): Your Workbook

Dear owner,

This is a working file, not a souvenir. Over seven days it fills up with things your business will run on: a proposal template, a hiring kit, your first SOP, an MIS routine, a macro library, your AI policy, and a 90-day plan. Write in it, fold it, spill chai on it, and bring it to every session, because each day builds on the last. Every prompt from the programme is here with blanks for your company's details, so a year from now this workbook still earns its place on your desk.

To work,

Team AI Coaching India

Before day one

- Install or bookmark **ChatGPT** (free tier is enough), **Google Gemini**, and **Microsoft Copilot**, work email preferred.
- Create free **Canva** and **Gamma** accounts. Open **NotebookLM** (free, Google account) once. Check **Perplexity** opens in your browser.
- Bring real raw material, it matters more than any app: one recent proposal or quotation, one report or sales summary (masked if sensitive), one process that lives only in someone's head, and one open or upcoming hire.
- If your accounts run on Tally or Busy, watch your accountant export one sales report to Excel before Day 5. Just once.
- One reassurance: nothing here needs coding or IT staff. If you run a business on WhatsApp and email, you can run everything here.

Day 1: Where AI pays and where it is hype

What today was really about

Within thirty minutes, AI drafted a usable document from your own business, live. The rest of the day was a filter: where AI genuinely saves SME money today (drafting, summarising, structuring, translating) and where the hype is empty (autopilot decisions, guaranteed leads). Your ranked opportunity map is the spine of the week.

Prompts we used

1. My business: _____, team of _____. Our three most time-eating document tasks: _____. For each, tell me honestly whether AI can help today, and how.
2. Draft a first version of this document for my business: _____. Ask me 5 questions first, one at a time, before writing.

3. Sort this week's tasks into three buckets: AI drafts it, AI assists but a human leads, AI stays away. One-line reason each. Tasks: _____
4. What do businesses like mine (_____ industry, _____ size) waste money on when adopting AI? Give 5 honest warnings.
5. Rank these 3 AI use cases for my business by money saved versus effort: _____. Reasoning, then a one-line verdict each.

Now you try

1. Your three highest-value use cases, ranked: _____
2. The task where AI's draft genuinely surprised you today: _____
3. The one thing you hoped AI could do that it honestly cannot yet: _____

Watch out

WATCH OUT

Hallucination in a business setting is a client-facing risk. AI will invent a statistic, a clause, or a competitor fact with total confidence. Standing rule from today: every AI output that leaves the building passes a human check first. And client names, financials, and employee data never go into public AI tools.

My notes

Day 2: Sales, proposals and quotations

What today was really about

Proposal turnaround is where SMEs quietly lose deals: the client who waited four days said yes to whoever answered in four hours. You found what clients actually read (scope, price, credibility, next step), built a reusable structure AI fills per client, and left with a real proposal for a live prospect.

Prompts we used

1. Here is my current proposal, masked: _____. Critique it as a busy client: what would you skip, what is missing, what is filler? Be blunt.
2. Build a reusable proposal template for _____ services: client problem, our approach, scope with inclusions and exclusions, timeline, pricing, next step. Short sections.
3. Fill my template for this prospect: client _____, need _____, our offering _____, price _____. Formal but warm, Indian business English.

4. Rewrite this quotation's scope lines so nothing is vague and disputes cannot hide in the wording:

5. Adapt this proposal from client type _____ to _____. Change emphasis and examples, keep structure and pricing format.

6. Write a 3-email follow-up sequence for a proposal sent to _____: day 3 gentle, day 7 value-adding, day 14 polite closing. Short, no begging.

Now you try

1. Which sections did you add or cut versus AI's suggested template? _____

2. Your live-prospect proposal: which client, and when does it go after human review?

3. Old turnaround time versus today's: _____

Watch out

WATCH OUT

AI fills templates beautifully and invents details just as beautifully. Before any proposal leaves: verify every number, date, scope promise, and client name. One wrong price in a sent proposal costs more than the hours AI saved.

My notes

Day 3: Hiring, JDs and screening

What today was really about

Bad hires are the most expensive mistake in an SME, and most start with a vague JD. Today: a JD that attracts the right people and filters the wrong ones, salary bands with sources you verified yourself, and a screening checklist with scoring, so shortlisting stops depending on mood. The bright line: AI never makes the hiring call.

Prompts we used

1. Write a JD for _____ at my company (_____ industry, _____ city, team of _____): what the role owns, a good first 90 days, must-have and nice-to-have skills, what we offer. Honest, no fluff.

2. Read this JD and list what would make a strong candidate skip it and a weak one feel invited. Fix both: _____

3. In Perplexity: typical salary range for _____ in _____ at a company of _____ size? List sources so I can verify them.
4. Build a screening checklist for this role: 8 to 10 criteria with a 1-to-5 scoring guide each, so two screeners score the same CV similarly: _____
5. Draft 12 interview questions for _____: 4 on skills with expected answer signals, 4 on judgment in my industry's situations, 4 on work habits. Mark answers that should worry me.
6. Where can bias creep into AI-assisted screening for this role, and what do I do about each risk?

Now you try

1. What did you change in AI's JD draft to make it truly yours? _____
2. Your checklist's three most heavily weighted criteria: _____
3. The salary band you found, and the two sources you actually opened: _____

Watch out

WATCH OUT

Perplexity gives sources; your job is to open them. Salary data runs stale or city-mismatched. And never paste real CVs with names and contacts into public AI tools: screen against criteria, keep identities out. The final call on any candidate is human, always.

My notes

Day 4: Operations, SOPs that stick

What today was really about

Every SME has a person whose absence stops a process. The fix is the interview method: the expert describes the process aloud, AI structures the mess into steps, owners, and checkpoints, and the expert corrects the draft. Correcting takes minutes; blank pages never get written. You left with one real SOP, a NotebookLM notebook that answers from your documents, and a next-ten list.

Prompts we used

1. I will describe a process aloud, messily. Turn it into a clean SOP: purpose, trigger, numbered steps, owner per step, checkpoints where things go wrong, what done looks like. Description: _____
2. Read this SOP as a brand-new employee on day one. List every point where you would be confused or have to ask someone: _____

3. Rewrite step _____ to include the exception: what to do when _____ happens.
4. Here are 15 processes in my business: _____. Rank the 10 to document first by: what breaks if the key person is absent, frequency, and error-proneness.
5. Write a half-page guide for my team on describing a process aloud for SOP capture: what to mention, what to skip, how long to speak.

Now you try

1. Which process did you SOP, and whose head did it live in? _____
2. What did the expert correct in AI's draft? (That gap is why humans stay in the loop):

3. Your first three of the next ten SOPs, each with an owner and target week: _____

Watch out

WATCH OUT

An SOP nobody can find does not exist. Decide today where SOPs live (one shared folder, clearly named) and who keeps them current. Before uploading to NotebookLM, apply your data rules: mask what is sensitive, use work accounts.

My notes

Day 5: MIS, numbers into decisions

What today was really about

Most owners read the business through feel, because the numbers arrive late or ugly. Today's pipeline: export first, then summarise. Data comes OUT of Tally, Busy, or your billing app into a Sheets export, because AI works on exports, never on live books. Then AI turned that export into a plain-language weekly summary your team can produce without you.

Prompts we used

1. My accountant exports these reports from Tally (or Busy): _____. For a weekly owner's MIS, which columns matter and which are noise? Give a trimmed structure for the Sheets export.
2. Here is this week's sales and expense export as rows: _____. Write a plain-language MIS summary: totals versus last week, top 3 movers, expense exceptions, 3 questions an owner should ask.

3. From the same data, flag anything that looks like an anomaly: a duplicate, a missing day, a number that breaks the pattern. Flag, do not explain away.
4. Turn this into a weekly routine: who exports what by when, which prompt runs, who reads it, where it is filed. Team roles: _____
5. Write a one-page instruction sheet for my _____ (role) to run this routine every Monday without asking me anything.

Now you try

1. Which system holds your numbers, and did the export-to-Sheets step work? What tripped?

2. The one trend or exception in your first MIS summary you had not noticed before:

3. You verified AI's totals against the source export by hand. Did they match exactly?

Watch out

WATCH OUT

AI can misread numbers: a shifted column, a lakh read as a thousand. Discipline: totals in every AI summary are verified against the source export before any decision. The summary is a lens; your books remain the truth. Exports only, never a live connection.

My notes

Day 6: Support macros and your AI policy

What today was really about

Two builds. First, your macro library: 50 recent queries mined for patterns, then responses in Hindi and English loaded into WhatsApp Business quick replies, so the whole team answers consistently. Second, the bigger one: your AI usage policy. Your staff is already pasting things into free AI tools with good intentions and no rules. Today you wrote the rules, one page, plain words.

Prompts we used

1. Here are 50 recent customer queries, masked: _____. Group them into patterns and tell me which 10 macros would cover most of them.
2. Write macro responses for these top queries, each in Hindi and English, under 60 words, tone _____: _____

3. Write a complaint response framework: acknowledge specifically, state what we do by when, offer escalation. Apply it to this real complaint: _____
4. Draft a one-page AI usage policy for my company (_____ industry, _____ employees): data that never enters public AI tools, outputs needing human review before leaving the company, when we disclose AI use to clients, approved tools. Plain words a new joiner understands.
5. Turn the policy into a 10-minute team talk script: why it exists, the three rules that matter most, what happens when something goes wrong. No scolding tone.
6. Poke holes in my policy draft: which situations does it not cover? List edge cases from a business like mine.

Now you try

1. Your top 10 macros cover roughly what share of daily queries? _____
2. Which macros went into WhatsApp Business quick replies today? _____
3. Your policy's three non-negotiables, who signs off, and when the team hears it: _____

Watch out

WATCH OUT

A policy that reads like a legal notice gets ignored by Friday. One page, plain words, lead with why: one pasted client list into a public tool can end a client relationship. The policy protects the team as much as the company; say so when you roll it out.

My notes

Day 7: Capstone, your 90-day AI adoption plan

What today was really about

Seven days of working sessions became one rollout plan: three phases of 30 days, each with owners and checkpoints. You chose what ships first based on what worked this week, and set honest measures: hours saved and errors caught, not vanity metrics. Then the room challenged your plan, which is exactly what it needed.

Prompts we used

1. Here is what I built this week and how each performed: _____. Draft my 90-day AI adoption plan: days 1 to 30 embed the two winners, 31 to 60 extend to the next two use cases, 61

to 90 review and decide what scales. Owners and checkpoints per item. My team:

2. Define each item's honest success measure: hours saved, turnaround cut, or errors caught. Reject measures that sound impressive but prove nothing.
3. My team member _____ is sceptical of AI because _____. Plan their first 30 days so their first experience helps them personally.
4. Challenge my plan as a blunt adviser: where is it overambitious, what dependency am I ignoring, what slips first?
5. Write the 6-month review agenda: what to re-verify about tools, costs, and results, and the questions that decide scale, hold, or stop.

Now you try

1. Your two Phase 1 winners and their owners: _____
2. The sharpest challenge you received, and your answer: _____
3. Your three checkpoint dates, now in a real calendar and written here: _____

Watch out

WATCH OUT

The classic failure: announce AI adoption as a grand transformation, then let it die by week six. Small visible wins, named owners, and checkpoint dates on a real calendar beat any announcement. Guard the checkpoints; they are the plan.

My notes

Your complete prompt library

Day 1: Where AI pays

1. My business: _____, team of _____. Our three most time-eating document tasks: _____. For each, tell me honestly whether AI can help today, and how.
2. Draft a first version of this document for my business: _____. Ask me 5 questions first, one at a time, before writing.
3. Sort this week's tasks into three buckets: AI drafts it, AI assists but a human leads, AI stays away. One-line reason each. Tasks: _____
4. What do businesses like mine (_____ industry, _____ size) waste money on when adopting AI? Give 5 honest warnings.

5. Rank these 3 AI use cases for my business by money saved versus effort: _____.

Reasoning, then a one-line verdict each.

Day 2: Proposals and quotations

6. Here is my current proposal, masked: _____. Critique it as a busy client: what would you skip, what is missing, what is filler? Be blunt.
7. Build a reusable proposal template for _____ services: client problem, our approach, scope with inclusions and exclusions, timeline, pricing, next step. Short sections.
8. Fill my template for this prospect: client _____, need _____, our offering _____, price _____. Formal but warm, Indian business English.
9. Rewrite this quotation's scope lines so nothing is vague and disputes cannot hide in the wording: _____
10. Adapt this proposal from client type _____ to _____. Change emphasis and examples, keep structure and pricing format.
11. Write a 3-email follow-up sequence for a proposal sent to _____: day 3 gentle, day 7 value-adding, day 14 polite closing. Short, no begging.

Day 3: Hiring

2. Write a JD for _____ at my company (_____ industry, _____ city, team of _____): what the role owns, a good first 90 days, must-have and nice-to-have skills, what we offer. Honest, no fluff.
3. Read this JD and list what would make a strong candidate skip it and a weak one feel invited. Fix both: _____
4. In Perplexity: typical salary range for _____ in _____ at a company of _____ size? List sources so I can verify them.
5. Build a screening checklist for this role: 8 to 10 criteria with a 1-to-5 scoring guide each, so two screeners score the same CV similarly: _____
6. Draft 12 interview questions for _____: 4 on skills with expected answer signals, 4 on judgment in my industry's situations, 4 on work habits. Mark answers that should worry me.
7. Where can bias creep into AI-assisted screening for this role, and what do I do about each risk?

Day 4: SOPs

8. I will describe a process aloud, messily. Turn it into a clean SOP: purpose, trigger, numbered steps, owner per step, checkpoints where things go wrong, what done looks like. Description: _____
9. Read this SOP as a brand-new employee on day one. List every point where you would be confused or have to ask someone: _____
10. Rewrite step _____ to include the exception: what to do when _____ happens.
11. Here are 15 processes in my business: _____. Rank the 10 to document first by: what breaks if the key person is absent, frequency, and error-proneness.

- !2. Write a half-page guide for my team on describing a process aloud for SOP capture: what to mention, what to skip, how long to speak.

Day 5: MIS

- !3. My accountant exports these reports from Tally (or Busy): _____. For a weekly owner's MIS, which columns matter and which are noise? Give a trimmed structure for the Sheets export.
- !4. Here is this week's sales and expense export as rows: _____. Write a plain-language MIS summary: totals versus last week, top 3 movers, expense exceptions, 3 questions an owner should ask.
- !5. From the same data, flag anything that looks like an anomaly: a duplicate, a missing day, a number that breaks the pattern. Flag, do not explain away.
- !6. Turn this into a weekly routine: who exports what by when, which prompt runs, who reads it, where it is filed. Team roles: _____
- !7. Write a one-page instruction sheet for my _____ (role) to run this routine every Monday without asking me anything.

Day 6: Macros and AI policy

- !8. Here are 50 recent customer queries, masked: _____. Group them into patterns and tell me which 10 macros would cover most of them.
- !9. Write macro responses for these top queries, each in Hindi and English, under 60 words, tone _____: _____
- !10. Write a complaint response framework: acknowledge specifically, state what we do by when, offer escalation. Apply it to this real complaint: _____
- !11. Draft a one-page AI usage policy for my company (_____ industry, _____ employees): data that never enters public AI tools, outputs needing human review, when we disclose AI use, approved tools. Plain words a new joiner understands.
- !12. Turn the policy into a 10-minute team talk script: why it exists, the three rules that matter most, what happens when something goes wrong. No scolding tone.
- !13. Poke holes in my policy draft: which situations does it not cover? List edge cases from a business like mine.

Day 7: The 90-day plan

- !4. Here is what I built this week and how each performed: _____. Draft my 90-day AI adoption plan: days 1 to 30 embed the two winners, 31 to 60 extend to the next two use cases, 61 to 90 review and decide what scales. Owners and checkpoints per item. My team: _____
- !5. Define each item's honest success measure: hours saved, turnaround cut, or errors caught. Reject measures that sound impressive but prove nothing.
- !6. My team member _____ is sceptical of AI because _____. Plan their first 30 days so their first experience helps them personally.
- !7. Challenge my plan as a blunt adviser: where is it overambitious, what dependency am I ignoring, what slips first?

18. Write the 6-month review agenda: what to re-verify about tools, costs, and results, and the questions that decide scale, hold, or stop.
-

Your safety card

This card is company policy material. Share it with your team alongside your AI policy.

Never enters public AI tools: client names and contact lists, contracts and pricing agreements, financials and live accounting data (masked exports only), employee records and CVs with personal details, anything under NDA or unreleased.

Verification habits: every AI output leaving the company passes a named human reviewer; every number in an AI summary is checked against the source export; every cited source actually gets opened.

Frauds to keep the office alert to:

- Vendor emails with "updated bank details": verify by phone on a known number before any change.
- Urgent payment instructions seeming to come from the owner on WhatsApp or email: verify by voice, every time.
- Fake payment screenshots: the bank statement is the only truth.
- AI voice clones make "the owner called and told me" unreliable: agree on a callback habit for unusual payment instructions.

If money is lost to fraud: call **1930**, the national cyber fraud helpline, immediately, and inform your bank the same hour.

Keep going: your 30-day plan

Your 90-day plan already schedules the month; this weekly rhythm keeps it alive.

Every Monday: your team runs the MIS routine; you read the summary and ask the three questions it raises.

Every Wednesday: one proposal, JD, or client document goes through your new template instead of the old way. Note minutes saved, honestly.

Every Friday: fifteen minutes: one SOP captured or corrected by its owner, plus a glance at macro usage and team questions about the AI policy.

Day 30: first checkpoint: hours saved, errors caught, what ships in Phase 2. Write the numbers down, even if small. Especially if small.

Plain-words glossary

- **Use case:** one specific task AI does for your business, like drafting proposals.

- **Hallucination:** AI stating false things confidently: fake statistics, invented clauses. Why human review exists.
- **Public AI tool:** a free or personal-account AI service; assume anything pasted there may not stay private.
- **Template:** a reusable document skeleton AI fills per client, so quality stops depending on the writer.
- **Screening checklist:** fixed criteria with scores, so shortlisting is consistent and defensible.
- **SOP:** standard operating procedure. A process written with steps, owners, and checkpoints, so it survives absences.
- **NotebookLM:** a free tool that answers questions using only the documents you upload to it.
- **MIS:** management information system. Here: the weekly plain-language summary of your numbers.
- **Export:** taking data out of Tally, Busy, or a billing app into a file. AI works on exports, never live books.
- **Anomaly:** a number that breaks the pattern: a duplicate, a gap, a spike. Flag first, explain later.
- **Macro:** a ready, approved response to a common customer query, used by the whole team.
- **AI usage policy:** your one-page rules: what data stays out, what gets reviewed, when AI use is disclosed.
- **Checkpoint:** a dated review where you measure honestly and decide: scale, hold, or stop.