

# AI and Your Small Business

Where AI fits in your business and where it doesn't

Kelsey Ruger | Hello Alice



# You're already using AI. The question is whether you're using it **on purpose.**

Spam filters. Google Maps. Autocomplete. Recommendation engines. AI has been running quietly in the background of your business for years. What's changed is that now you can put it to work directly — if you know where to start.



# It's Not Magic It's Just Prediction.

Strip away the sci-fi. AI is simply a tool that looks at massive amounts of data to predict what comes next. It's a pattern-matching engine, not a person.

**The question isn't "should I?"  
It's "how do I start smart?"**

## QUICK SHOW OF HANDS

Who's already using AI  
and doesn't realize it?

- Spam Filters
- Google Map Routing
- Autocomplete / Predictive Text
- Face ID



# High Level AI Types

## **Generative AI**

Creates new content including text, images, music, code or synthetic data—by learning patterns from existing datasets

## **Predictive AI**

Analyzes historical data to forecast future outcomes such as sales trends, customer churn, or fraud risk

## **Computer Vision**

Enables machines to interpret visual inputs through tasks like image classes, object detection, and video analysis

## **Conversational AI**

Uses natural language to understand and generate responses, powering chatbots, virtual assistants, and automated support



# Demystifying Generative AI

The real reason Generative AI is everywhere right now is because for the first time, the tool speaks the same language we do. That's worth paying attention to, not with fear or hype, but with an optimistic, clear-eyed perspective. Three questions can help frame that conversation.

## ORGANIZATIONS

### **What types of companies become possible?**

What becomes viable when intelligence is infrastructure, not a feature?

## PRODUCTS

### **What types of products become possible?**

What couldn't exist when human attention was the constraint?

## PEOPLE

### **What types of people will thrive?**

What did you bring before the tools arrived?

# We All Have The Same Anchors

THE INNOVATION IMPERATIVE



# Every business whether it's a restaurant, contractor, property manager — runs on these six areas

## Demand Generation

The systems you use to attract potential customers, build awareness, and create a steady flow of qualified leads into your business.

## Conversion

The process of turning interested prospects into paying customers through sales conversations, proposals, pricing, and closing.

## Delivery

How you fulfill your promise to customers by providing the product or service they paid for with consistent quality and reliability.

## Operations

The behind-the-scenes systems, processes, and workflows that keep your business running smoothly day to day.

## Nurturing

How you maintain relationships with existing customers, encourage repeat business, gather feedback, and generate referrals.

## Profit

How you track and manage the financial health of your business, including revenue, expenses, margins, and cash flow.





# What AI Looks Like In Each Anchor Area

Real examples from businesses like yours. Not hype just practical examples for a smarter workday.



## Demand Generation

AI drafts your weekly social posts, email campaigns, and event invites in your voice —review, not write.



## Conversion

A contractor uses AI to turn a site visit into a polished proposal in minutes instead of hours.



## Delivery

A property manager generates lease summaries, move-in checklists, and tenant communications automatically.



## Operations

Meeting notes, task lists, and follow-ups created from a single recorded conversation. No more lost action items.



## Nurturing

AI monitors reviews across platforms, drafts responses, and flags issues before they become problems.



## Profit

Weekly cash flow summaries and expense pattern alerts generated from your bookkeeping data, no analyst needed.



# Choosing Your Approach

Once you know where to start, the next question is how deep AI goes. Not everything needs the same approach.

## **Augment**

AI works alongside you. You're still driving, it just makes you faster and sharper. This is where most people already are, so start here.

## **Automate**

Hand it off completely. Repetitive, rules-based tasks that don't need your judgment. AI can handle these tasks on its own

## **Autonomy**

Know where the human touch matter. Client relationships, strategic decisions, and the judgment calls that define your business. AI helps but doesn't own them.

**"Most people are already augmenting whether they realize it or not. Name it, get intentional about it, and then look for what's ready to automate."**



KEY TAKEAWAY

You don't need to use AI everywhere.  
Find the one area where you feel the  
most friction.

You already have policies  
for handling money and  
securing your network.  
**AI is no different.**

This isn't about fear. It's about doing it right. The same way you approach every other part of running a responsible business.



# A Simple Framework for Any Business, Any Size

AI moves fast, but adopting it doesn't have to be reckless. You don't need a massive strategy to use it well. You need a simple structure that helps you ask the right questions before, during, and after you bring in a new tool.

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**G**

## Governance

Designate who asks "what could go wrong?" before turning on a new tool. Someone owns this, even in a five-person business.

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**U**

## Understanding

Know what AI can and can't do. It's a confident intern, not an expert. It will give you wrong answers with total certainty.

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**I**

## Implementation

Start controlled. Test on internal tasks before anything customer-facing. Decide what data goes in and what stays out.

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**D**

## Develop

Train your team to verify outputs, spot issues, and recognize AI-generated errors. Build the muscle, not just the tool access.

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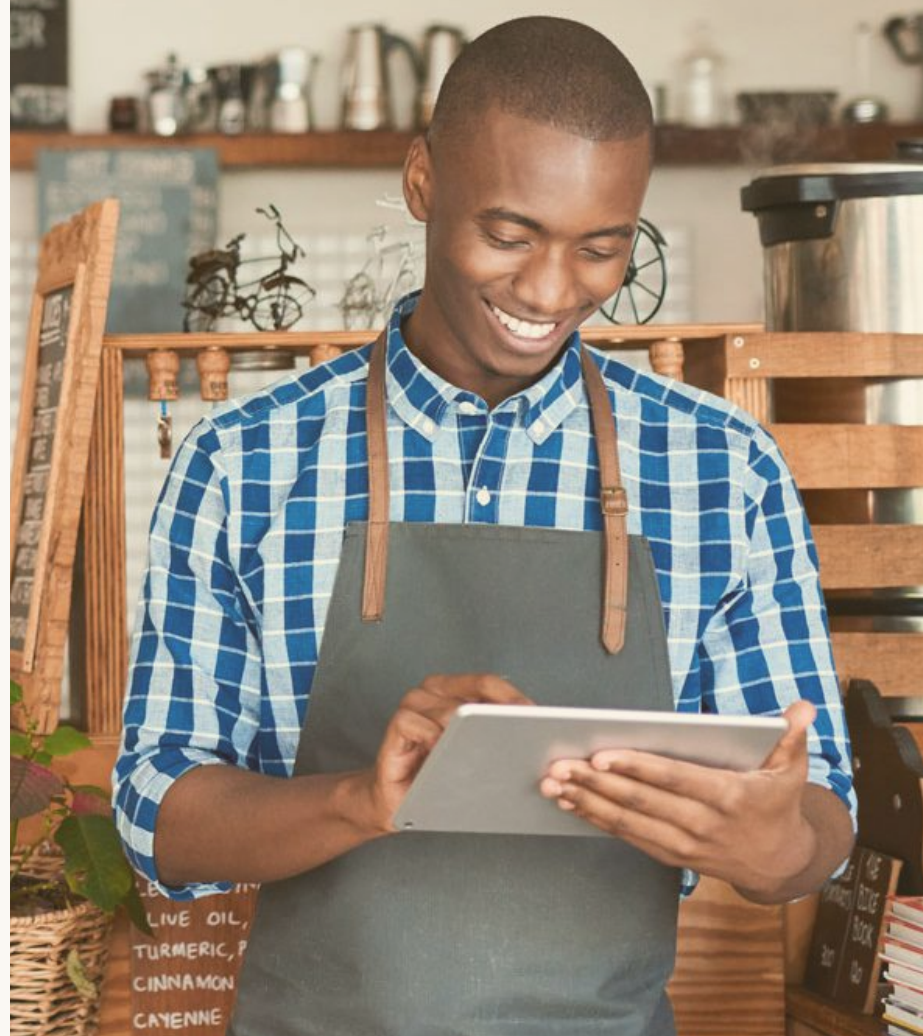
**E**

## Evolve

AI changes fast. Your policies should be living documents. Review quarterly: what's working, what's new, what needs updating.

## The Mindset Shift For AI

GUIDE isn't a rulebook. AI moves too fast for rigid policies that are outdated the moment you write them. Think of it as a set of guidelines — flexible enough to evolve with the technology, structured enough to keep you from flying blind. That's what actually speeds you up.



# People Are People

HOW TO THRIVE WITH THE AI



# Metaskills: What AI Can't Replace

AI can produce the output. It can't decide whether the output is right. These six capabilities are your bridge for effective AI.

<b>EXPLORING</b>	<b>CREATING</b>	<b>FEELING</b>
Learning	Building	Connecting
Questioning	Breaking	Empathizing
Facilitating	Reframing	Storytelling
<b>IMAGING</b>	<b>INNOVATING</b>	<b>ADAPTING</b>
Improvising	Idea Fluency	Resourcefulness
Observing	Idea Articulation	Responsiveness
Playing	Originality	Flexibility

# What To Do Next

WHAT'S POSSIBLE

# WHAT'S AHEAD



The subtle art of  
capturing light  
and shadow...



#### KEY TAKEAWAY

The businesses that win won't be the most technical. They'll be the most **intentional** about where they apply AI.

# Actions To Take This Week

No tech team required. No big budget. Just curiosity and 30 minutes.



# Before The Weekend You Can Do All Three of These

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## 01

### Find Your Friction

Write down the one task that eats the most time with the least return. That's your AI starting point. Not a tool decision — a problem decision.

EXAMPLE

"I spend two hours every Monday writing the same follow-up emails."

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## 02

### Try One Tool For 30 Minutes

Pick an AI tool and give it a real task. Draft an email. Summarize a document. Create a social post. See what happens.

EXAMPLE

Use Claude or your email platform's AI to draft a customer follow-up. Compare it to what you'd write.

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## 03

### Apply The Tuesday Test

Does this tool save you meaningful time on a normal, busy Tuesday? Not a demo. Not a best case. A real Tuesday.

EXAMPLE

"Did it save me 20 minutes I actually got back? Or did setup eat the time I saved?"



# Think In Categories, Not Tool Names

Tools change every month. These categories don't. Know what you need, then use a research tool like Perplexity to find the best current option.

CATEGORY	WHAT IT DOES FOR YOU
<b>Core LLM</b>	Your general-purpose thinking partner. Writing, analysis, brainstorming, problem-solving.
<b>Meeting Intelligence</b>	Captures and organizes what happens in conversations so nothing gets lost.
<b>Automation &amp; Workflows</b>	Connects your tools and eliminates the manual steps between them.
<b>Research &amp; Search</b>	Finds, compares, and synthesizes information faster than you can browse.
<b>Content &amp; Design</b>	Creates visual and written assets from a description instead of from scratch.
<b>Specialized / Industry</b>	Tools built for your specific type of business or workflow.



# Keeping Up With The Changing Landscape

AI is no longer just a tool you ask questions. It's becoming something that works alongside you — and that changes what matters most.

## From Tools to Agents

AI is moving from single tasks to full workflows. Complex tasks that used to take an afternoon can be completed in one instruction. You stay in charge. The busywork between decisions disappears.

### EXAMPLE

You set up an agent that monitors your supplier prices, flags when a better option appears, drafts the switch proposal, and sends it to you weekly. You didn't ask it to run — it just runs. You only step in when there's a decision to make."

## Your Expertise Is the Edge

As AI handles more execution, the differentiator isn't the technology. It's your judgment, your relationships, and your knowledge of your customers. Stay the expert in your business — and let AI handle the rest.

### EXAMPLE

Two coffee shops deploy the same agent to manage reordering. One owner trained hers with fifteen years of knowing that oat milk demand spikes every January. The other left it on defaults. Same agent, different results — because one had the judgment to teach it what mattered.

# The Core Skills & Tools

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## 01 Specification Skills

- **Constraint Arc**            Define must / must not / should
- **70/25/5 Rule:**            The 5 Ws + H before you start
- **Curiosity Loops:**        ASking “What did I miss”
- **Three As:**                 Automating or Augmenting

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## 03 Data Hygiene

- **Doc First:**                If it’s not written, AI Can’t Help
- **Privacy:**                 No PII in public models. Ever.
- **Manage Context:**        Keep the context efficient with structure
- **Manage Memory:**        Help the agents remember

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## 02 Core Tool Stack

- **LLM/Agent Foundation:**    ChatGPT, Gemini, Claude
- **Meeting Intel:**            [Otter.ai](#), Fathom, Fireflies
- **Automation 1:**            Zapier, n8n, or Make
- **Automation 2:**            Claude Code, Codex

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## 04 Consistent Execution

- **Red Teaming**              Try to break the output
- **Prompt Library:**         Don't reinvent the wheel. Share it.
- **AI Wins:**                 Weekly demo of what worked

The best time to start was **yesterday**.  
The second best time is **this afternoon**.

Questions? Let's talk.



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