THE UPLAND GROUP

How to AI

A Practical Guide for Small Business Owners

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What This Guide Is

This is a plain-English guide to using AI in your business. No jargon, no hype. A framework for thinking about when AI helps, how to talk to it, and how to make it part of how you work.

You don't need to be technical. If you can describe a problem to a coworker, you can use AI.

Part 1: When to Use AI (and When Not To)

AI is great at:

- Summarizing data across multiple sources into clean, readable reports
- Comparing bids, invoices, or proposals against historical pricing and flagging outliers
- Tracking deadlines and renewals across clients, projects, or accounts
- Drafting first versions of emails, memos, reports, and proposals from your notes
- Categorizing and reconciling transactions, expenses, and line items
- Modeling scenarios when inputs change (pricing, staffing, budgets, timelines)

AI is NOT great at:

- Judgment calls that require relationships. Hiring, negotiating, choosing a vendor you trust. AI can give you data, but the decision is yours.
- Anything requiring physical presence. AI can help you plan the work, but it can't do the work on site.
- Situations with no clear rules. If you can't explain what "good" looks like, AI can't either.
- Replacing your expertise. AI is a tool, like a power drill. It makes you faster. It doesn't replace the person holding it.

The 5-Minute Test

Before asking AI to do something, ask yourself:

1. Could I explain this task to a new hire in 5 minutes? If yes, AI can probably do it.
2. Would I trust a smart intern with this? AI performs at about that level: fast but needs clear instructions and a review.
3. Is there a "right answer" I can check against? If you can verify the output (match it to a source document, compare it to a known benchmark), AI is a good fit.

If you answered yes to at least two of those, it's worth trying.

Part 2: How to Talk to AI

AI responds to how you ask, not just what you ask. A vague question gets a vague answer. A specific question gets a useful one.

The CRIT Framework

Every AI interaction has four parts. The better you set these up, the better the output.

1. Context (What's the situation?)

Give the AI the same background you'd give a trusted advisor. Don't assume it knows anything about your business.

Weak	Strong
"Help me with my numbers."	"I run a 12-person services business. Revenue was $1.8M last year. I need to reconcile Q1 expenses against our budget. Here's the transaction export and the original budget."
"Write me an email."	"Write a follow-up email to a vendor who submitted a proposal at $47,000, which is 30% above the last two engagements. I want to negotiate without burning the relationship."

2. Role (Who should AI be?)

Tell the AI what expertise to bring. This shapes the quality of the response.

- "Act as an experienced bookkeeper reviewing these transactions for errors."
- "Act as a business consultant helping me evaluate whether to take on a new client."
- "Act as a financial analyst reviewing this budget for hidden cost overruns."

3. Interview (Let AI ask you questions)

This is the most underused part. Let the AI ask you clarifying questions before it gives you an answer. It catches blind spots.

- "Before you answer, ask me up to 3 questions to make sure you understand the situation."

This single line changes the output quality. It's the difference between AI guessing and AI understanding.

4. Task (What do you want done?)

Be specific about the deliverable and the format.

Vague	Specific
"Help me with this project."	"Compare actual costs against budget for Q1. Flag any line items more than 10% over. Present as a table with columns for budget, actual, variance, and a note explaining the overage."
"Look at this proposal."	"Review this vendor proposal. Compare the per-unit price to our last three similar engagements. Tell me if anything looks off and why."

Quick Template

Copy and adapt this for any request:

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Context: [Describe the situation. Include relevant details, files, or data.]

Role: Act as [relevant expert] with experience in [relevant area].

Interview: Ask me up to [2-3] questions before proceeding.

Task: [Exactly what you want. Be specific about format and detail level.]
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Example in Action

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Context: I run a services business with 12 client accounts. One client's
expenses came in 22% over budget last quarter. I have the transaction
export and the original budget.

Role: Act as a financial analyst with experience in small business
operations and cost management.

Interview: Ask me up to 3 questions about the client's business,
seasonal patterns, or unusual expenses before analyzing the variance.

Task: After your questions, tell me:
  1. Which expense categories are driving the overage
  2. Whether the variance looks one-time or structural
  3. What corrective actions I should recommend to the client
Format as bullet points.
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Part 3: What Changes With Skills

The framework above works for any AI tool (ChatGPT, Claude, etc.). But re-typing context every time gets old fast.

Skills solve this. A skill is a pre-built set of instructions that already contains your context, your preferred role, and your task format. Instead of writing a prompt from scratch every time, you invoke the skill and give it the specific input.

Without a skill:

You write a detailed prompt every time you want to reconcile a statement, review a proposal, or generate a client report. You re-explain your business, your preferences, and your format requirements.

With a skill:

You type one command. The skill already knows:

- What your business does
- What format you want
- What rules to follow
- Where to find relevant files

You just feed it the new data and review the output.

Approach	Effort	Consistency
Raw prompting (no skill)	High every time. You re-write context.	Varies. Different prompt = different quality.
Skill-based workflow	Low after setup. One command.	Consistent. Same rules, same format, every time.

A skill turns a 5-minute prompt into a 10-second command that produces the same quality output every time.

Part 4: Getting Started

Step 1: Identify Your Pain Points

What tasks eat your time? What falls through the cracks? Common candidates:

- Reporting. Generate performance summaries without hours of manual data assembly.
- Expense tracking. Categorize, reconcile, and flag anomalies from bank or system exports.

- Proposal review. Benchmark incoming bids or proposals against historical data in seconds.
- Deadline monitoring. Track renewals, expirations, and compliance deadlines before they lapse.
- Document drafting. Get 80% of reports, memos, and client communications drafted so you polish the last 20%.

Step 2: Start Small

Pick ONE task. The one that's most repetitive and most clearly defined. Build a skill for that. Use it for two weeks. Then add another.

Don't try to automate everything at once. The wins compound.

Step 3: Review, Don't Rubber-Stamp

AI is fast, not infallible. Always review the output before acting on it.

- Spot-check numbers against source documents
- Read summaries for accuracy, not just speed
- Flag anything that feels off and ask AI to explain its reasoning

The goal is AI doing 80% of the work so you can focus your expertise on the 20% that matters most.

Part 5: Common Questions

"Is my data safe?"

Everything runs locally on your machine. No data goes to external servers. Your files never leave your laptop.

"Do I need to be technical?"

No. Skills are written in plain English. If you can describe your workflow in a conversation, we can turn it into a skill.

"What does it cost?"

Claude Code Pro is $20/month. No per-seat licensing, no enterprise pricing, no hidden fees. Consulting to set up and build custom skills is scoped separately.

"What if I need to change how a skill works?"

Skills are text files. They can be edited, updated, or replaced anytime. You're not locked into anything.

"What if AI gives me bad output?"

Refine the instructions. Tell it what was wrong and what you want instead. AI improves with feedback. If the output is consistently off, the skill needs adjustment, which is a quick fix.

Quick Reference Card

The CRIT Framework

Step	What to Do	Example
Context	Describe the situation, data, and stakes	"I run a 12-person services company..."
Role	Tell AI what expert to be	"Act as a financial analyst with 15 years..."
Interview	Let AI ask clarifying questions	"Ask me up to 3 questions first."
Task	Specify the deliverable and format	"Flag any line items 10%+ over budget. Use a table."

Decision Tree: Should I Use AI for This?

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Can I explain it in 5 minutes?

'-- NO --> Break it into smaller pieces, then re-ask

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Built by The Upland Group. Questions? Reach out to Kris at kris@theuplandgroup.com