→ **Aigility Hub**

Start Small, Think Big

Your AI Foundation Worksheet

Welcome!

This worksheet helps you identify tasks in your business that AI can simplify, choose the right tools, and take your first steps.

Start small, focus on one area, and see how AI can save you time and reduce stress. Let's start to build your AI foundation together!

Step 1: Identify your challenges

Think about the areas in your business where you spend the most time or feel the most frustration.

Write down specific tasks for each category below

A. Time management (e.g., scheduling meetings, managing deadlines)

Task or challenge

Time spent (Daily/Weekly)

B. Customer engagement (e.g., responding to FAQs, following up with customers)

Task or challenge

Time spent (Daily/Weekly)

C. Content creation (e.g., writing blogs, creating social media posts)

Task or challenge

Time spent (Daily/Weekly)

D. Data analysis & decisions (e.g., tracking sales trends, organizing feedback)

Task or challenge

Time spent (Daily/Weekly)

E. Others (e.g., training staff, managing vendors, inventory)

Task or challenge

Time spent (Daily/Weekly)

Step 2: Choose one task to focus on

From the tasks you listed, pick one task that feels the most time-consuming or repetitive.

Task name

Why this task? (E.g., It takes too much time or stresses me out)

Step 3: Action plan

Let's make AI work for you!

Start by identifying a task or challenge and explore how an AI tool can help.
Not sure where to start? Here are some simple tools to save time, engage customers,
and streamline your workflow.

→ **1. Time Management: Simplify your scheduling**

Tools: Calendly, Motion

How it helps: These tools automatically schedule meetings and manage your
priority tasks, reducing back-and-forth emails and freeing up time for
what matters most.

→ 2. Customer Engagement: Always be available

Tools: ChatGPT, ManyChat, Tidio, or HubSpot Chatbot

How it helps: AI-powered chatbots can respond to FAQs, improving response times and customer satisfaction, even when you're away.

Pro Tip: If you use a CRM or retail platform, check if it already has a chatbot feature built in!

→ 3. Content Creation: Create in minutes

Tools: ChatGPT, Claude, Gemini

How it helps: Quickly brainstorm ideas, draft social media posts, or even outline blogs to keep your content flowing without the stress.

→ 4. Data Analysis: Find insights easily

Tool: ChatGPT

How it helps: Use AI to analyze your business data, identify trends, and make smarter decisions without getting lost in spreadsheets.

Your Plan
Ready to take action? Use this simple framework to move forward:

Tool to explore:

How I'll use it: (e.g., Automate scheduling, generate content ideas)

When I'll start:

Melissa Lloyd | AI Mindset & Literacy Training   → www.aigilityhub.ai

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Need Help?
If you're unsure which tool to choose or how to get started, reach out!
I'm here to guide you. 📧 Email: hello@aigilityhub.com