



ASCENDEA

AI / BUSINESS GROWTH / PROMPT PACK

AI Prompts for Everyday Small-Business Operations

A practical UK SME prompt pack with 40 beginner-friendly prompts for choosing, testing and improving AI-assisted operations, marketing, customer service, reporting and team workflows. It includes safe-input guidance, human-review steps, privacy/outreach cautions, SOP and pilot templates, and an action workbook.



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ascendea.ai

ASCENDEA EDITION · OCTOBER 2026 · v1.0

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Chapter links and PDF bookmarks support navigation. Writing areas are for handwritten or separate notes, not interactive PDF forms.

Author: Rob Arnold · Ascendea · Edition v1.0 · October 2026

<https://ascendea.ai/>

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A practical UK SME prompt pack for choosing, testing and improving AI-assisted work

Author: Rob Arnold · Ascendea · <https://ascendea.ai/>

Edition v1.0 · October 2026

Before you begin

This prompt pack helps a small business owner or manager use an AI assistant to think through everyday work: administration, marketing, customer service, reporting and team adoption. It is written for people with limited technical experience. It does not assume that every problem needs AI, or that an AI-generated answer is correct.

Start with one small, reversible task. For example, a trades firm might improve the way it sorts web enquiries before trying to automate quotations. A B2B consultant might use AI to turn their own non-confidential notes into a draft agenda, then check it before sending. The useful outcome is a safer, clearer process — not merely a new subscription.

This is general business education, not legal, tax, financial, security, HR, medical or regulatory advice. Check current provider documentation, your contracts and suitable professional advice before putting an AI-assisted process into live use. No prompt, tool or checklist can guarantee compliance, security, savings, sales or accuracy.

How to use this pack

1. Choose one prompt that matches a real business problem.
2. Complete the square-bracket fields with concise, non-confidential context.
3. Paste it into an AI assistant you are authorised to use for business work.
4. Ask for a plain-English answer in a format you can act on, such as a checklist, draft SOP or decision table.
5. Check every factual claim, calculation, proposed integration and customer-facing wording yourself or with the appropriate person.
6. Test on permitted, low-risk examples. Keep a manual route and human approval for anything consequential.

Use a safe business snapshot

You can paste this small block before any prompt. It gives the assistant enough context without handing over a customer database, login, contract, payment card, API key, medical information or other sensitive material.

Business type and location: [for example, a six-person electrical contractor in Bristol]
 Customers: [consumer / B2B / both, in broad terms]
 The process I want to improve: [one process]
 Current tools: [for example, Microsoft 365, Xero, a shared inbox]
 People involved and their confidence with technology: [roles, not names]
 What a good result looks like: [measurable operational outcome]
 Limits: [budget range, time available, actions AI must not take]
 Data rule: Use only fictional, anonymised or approved non-sensitive examples. Do not ask for credentials.
 Please state assumptions, list risks or missing information, and give a simple manual fallback.

Five checks before you act on an AI answer

Check	What to do
Facts	Check names, prices, laws, dates, calculations and product features against a current primary source.
Authority	Confirm who can approve a change, send a message, issue a price, access a record or spend money.
Data	Remove unnecessary personal, confidential and commercially sensitive information before prompting.
Consequences	Keep a human decision-maker for customer promises, employment matters, regulated advice, payments, safety and other material decisions.
Fallback	Write down how work continues if the tool, integration or internet connection fails.

A simple sequence for beginners

Use **Prompts 1–5** to pick a problem and choose a proportionate tool. Use **Prompts 6–10** to design a modest workflow. Then use the marketing, customer-service or reporting prompts that fit your priority. Before expanding, complete the documentation, privacy and measurement prompts in **26–32**.

Illustrative example (fictional): A five-person Sheffield accountancy practice starts with meeting booking and an internal checklist for new-client information. It does not start by giving tax advice through a chatbot or uploading client records to an unapproved tool. It measures admin time and staff corrections before deciding whether to continue.

1. Understanding and planning AI use

1. Business process audit

Use this first. It helps you find a process worth improving rather than choosing technology first.

Act as a practical small-business operations adviser. Help me audit one area of work to find safe, worthwhile improvement opportunities. Use the business snapshot below.

Ask me a structured set of questions about:

1. Steps that happen repeatedly and in a similar order.
2. Work that is administrative rather than dependent on professional judgement.
3. Delays, duplicate entry, avoidable chasing or hand-offs.
4. The people, systems, data and approvals involved.
5. What could go wrong if an output is wrong or late.
6. A manual way to continue if an automated step fails.

Then create a table with: process; current trigger; owner; approximate volume; current time; pain point; possible non-AI improvement; possible AI-assisted improvement; risk; required human review; and a low-risk first test. Do not recommend automation for safety-critical, legal, financial, employment or customer-commitment decisions without a specialist review. State what evidence I still need.

[paste safe business snapshot]

Review before use: Treat the output as a question list, not a process map. Confirm it with the staff who actually do the work.

2. Phased implementation plan

A three-month plan can be a helpful planning window, not a promise that a project will be complete in 90 days.

Create a phased 12-week AI-assisted improvement plan for my small business. Keep it realistic for a team with limited technical confidence. Use these phases: understand and prepare; pilot one bounded workflow; review and decide.

For each week, give: objective; one or two small tasks; named role (not a personal name); input needed; expected output; check or approval; and a stop/pause condition.

Include time for staff feedback, checking provider terms, data/security review, testing with safe examples and documenting a manual fallback. Do not assume that a tool connects to my existing software until that is verified.

At the end, provide a short decision gate: continue, revise, pause or stop. List assumptions separately from known facts.

[paste safe business snapshot]

Review before use: Replace generic dates with your actual availability. Do not promise the plan to customers or staff as a guaranteed delivery schedule.

3. Tool selection matrix

Help me compare options for [business function] without assuming that a particular AI tool is required. First list the essential job to be done and a simpler non-AI alternative. Then create a decision matrix for up to [number] options.

Score each option from 1 to 5 only where information is available, and mark unknowns clearly. Compare: fit for the job; required skills; existing-system compatibility; data handling and account controls to check; setup effort; ongoing cost and usage charges; vendor support; ability to export data; human-review features; rollback/manual fallback; and likely implementation risk.

Give me a short set of questions to ask each provider or reseller. Do not state that a tool is compliant, secure, integrated or suitable unless I verify it in current official documentation and my own circumstances.

My function: [function]

Current tools: [tools]

Users and technical confidence: [roles/level]

Budget range: [range]

Non-negotiables: [for example, UK customer data must not be copied into public consumer accounts]

Review before use: Trial only with permitted test content. A free trial, an app directory listing or a salesperson's claim is not evidence that the tool meets your needs.

4. Value and cost planning calculator

This prompt distinguishes potential capacity from cash savings. It avoids treating an estimate as a return guarantee.

Help me build a simple value-and-cost worksheet for one proposed workflow. Use only the figures I supply; do not invent benchmarks. Show formulas and assumptions.

Calculate: current monthly task hours; estimated changed hours after human review; gross capacity released; monthly software/usage/support cost; one-off setup and

training cost; and a simple payback estimate if the assumptions hold. Create three scenarios: cautious, working assumption and adverse.

Explain that time saved is not automatically cash saved or extra revenue. Ask how the released time would actually be used, and include the cost of corrections, exceptions, staff training and any specialist support. Provide a blank input table I can update each month.

Current task volume and time: [figures/source]

Internal hourly cost or value assumption: [figure and why]

Expected change: [estimate]

Recurring costs: [figures]

One-off costs: [figures]

Observation period: [period]

Review before use: Check calculations in a spreadsheet. Keep VAT treatment, tax and commercial advice separate from this planning exercise.

5. Plain-English AI terms for your team

Explain these terms for a UK small-business team with limited technical experience: artificial intelligence; automation; machine learning; generative AI; natural-language processing; API; workflow integration; predictive analysis; prompt; and retrieval/search over approved documents.

For each term, give: a definition of no more than 35 words; one low-risk small-business example relevant to [industry]; one limitation or common misunderstanding; and one question we should ask before using it. Make clear that an AI assistant that searches documents is not necessarily trained on them, and do not make claims about a provider's data handling without its current documentation.

Review before use: Use the result as a discussion aid. Ask your provider to explain its own product in writing if the team will rely on it.

2. Time-saving workflow prompts

6. Email workflow designer

Design a cautious email workflow for [business type] that reduces routine administration without sending misleading or unwanted messages. Cover: welcome messages where consent and expectations support them; replies to genuine enquiries; incomplete booking or basket follow-up where appropriate; re-engagement only where permitted; thank-you and feedback requests; and an internal review queue.

For each workflow, specify trigger; audience; required permission/legitimate contact check; proposed message purpose; data fields; human approval point; opt-out method;

record to keep; and stop condition. Draft only neutral examples using placeholders. Do not recommend bulk unsolicited marketing or infer consent. Distinguish corporate B2B contacts from sole traders and partnerships where status matters, and tell me to check current ICO/PECR guidance before sending.

Current process and platform: [details]

Messages I want to improve: [details]

Customer type and location: [details]

Review before use: Check marketing rules and your privacy information before activating. A reply drafted by AI should be approved by someone who understands the customer situation.

7. Appointment scheduling setup

Create a beginner-friendly, numbered setup plan for appointment scheduling for [business type]. I use [calendar/tool] and currently spend about [time] arranging [meeting types].

Include: checking who owns the calendar; defining appointment types and buffers; connecting only approved calendars; booking questions that collect the minimum information; confirmation and reminder wording; rescheduling/cancellation rules; accessibility and time-zone checks; staff notification; a manual booking alternative; and a test plan using fictional appointments.

For each step name the owner, trigger/input, action, output and exception/human fallback. Do not assume any specific calendar or booking platform feature exists. Include a final privacy/data minimisation check.

Review before use: Test the cancellation link, staff availability and a double-booking scenario before sharing a booking page.

8. Document-workflow planner

Help me map a safer, simpler document workflow for [invoice / contract draft / form / approval / filing task]. Begin by separating documents that may be drafted, classified or extracted from documents that require professional review or secure handling.

Create a step-by-step process covering: source document; allowed data; naming/storage location; who checks extracted information; approval point; version control; retention/deletion question; access permissions; error correction; and manual fallback. If I mention contracts, invoices, tax or HR documents, state clearly that AI output is not a substitute for appropriate professional review.

Current process: [steps/tools]

Approximate volume: [volume]

Pain points: [pain points]
 People authorised to approve: [roles]

Review before use: Never rely on automatic extraction for bank details, payment amounts, legal clauses or identity information without independent checking.

9. Social content batching and scheduling

Create a sustainable four-week content-batching and scheduling workflow for [business type] on [platforms]. Use my real audience, business goals and capacity. Suggest a small set of themes, a repurposing plan, a review calendar and performance measures that match each platform.

Include: a source-of-truth for claims; brand voice notes; approval before publishing; a response guide for common questions; rules for when a human must reply; and a simple monthly review. Do not claim that posting frequency guarantees reach or engagement. Do not automate replies to complaints, safeguarding issues, pricing disputes or requests for professional advice.

Audience: [description]
 Topics we can speak about accurately: [topics]
 Current capacity: [hours/week]
 Existing material we own or can use: [items]

Review before use: Check every post for accuracy, permission to use imagery and current platform rules. Keep a person responsible for the account.

10. Workflow between two systems

Act as a cautious workflow analyst. Help me design a first draft for moving approved information from [System A] to [System B] for [specific task]. Explain the process in plain English before mentioning technical options.

Create a table showing: trigger; data field; source of truth; destination; transformation/AI step if any; owner; permission; duplicate-prevention check; error alert; log/audit record; and manual fallback. Identify what must be confirmed with each provider: integration availability, account permissions, data location, pricing/usage limits, deletion behaviour and support.

Avoid designs that automatically send customer communications, change financial data, overwrite records or expose personal data unless I have explicit authority, testing and human approval.

Current manual process: [steps]
 Data involved: [high-level description]
 Technical confidence: [level]
 Desired outcome: [outcome]

Review before use: Start with a one-way, non-destructive test using fictional or approved test records. Have a rollback method before enabling it for live work.

3. AI-assisted marketing prompts

11. Content calendar planner

Create a [four-week / quarter] content calendar for my small business. Start from our commercial purpose and audience questions, not from a need to post constantly. Recommend a manageable mix of [blog / email / social / case study / video] content that we can create accurately.

For each item, include: audience question; business purpose; format; outline; source material needed; factual/brand check; owner; due date; distribution step; and one meaningful measure. Flag claims that need evidence. Suggest how one approved piece can be adapted for other channels without copying it blindly.

Business and audience: [description]

Goals: [for example, explain a service / support existing customers]

Brand voice: [plain, helpful, technical, etc.]

Available expertise and source material: [details]

Realistic capacity: [hours/week]

Review before use: AI can suggest ideas, but it does not know your service, customer evidence or current laws unless you verify them.

12. Customer hypothesis builder

A persona is a working hypothesis, not a licence to stereotype people or infer sensitive traits.

Help me build evidence-led customer hypotheses for [product/service]. Separate known evidence from assumptions and questions to test. Avoid sensitive or irrelevant personal traits.

For each proposed customer group, show: role or situation; job to be done; trigger for seeking help; obstacles; decision criteria; likely questions; preferred information format; buying process; evidence we already have; and a respectful interview question. Include a section called “what we must not assume”.

Then write a one-page messaging summary with the problem we can credibly address, the evidence required for any claim, and a low-pressure next step. Do not invent demographics, motivations or statistics.

Current customers/evidence: [anonymised summary]

Offer: [description]

Possible groups to explore: [groups]

Review before use: Check hypotheses through real conversations, consented feedback or lawful research. Do not upload a CRM export to an unapproved AI tool.

13. Platform-by-platform social plan

Build a practical social-media plan for [platforms] for a [business type] serving [audience]. Start by asking what each channel is expected to do for the business. Recommend a small number of content formats, topics, production steps and a weekly routine within [time] hours.

For each platform, give: audience intent; appropriate content type; posting rhythm as a test rather than a guarantee; call to action; approval check; community-response rule; and measures to observe. Add an escalation guide for complaints, data requests, safeguarding concerns, service failures and sales enquiries. Do not use auto-replies that could make a commitment or pretend to be a person.

Current presence: [summary]

Topics and proof points we own: [summary]

Brand voice and boundaries: [summary]

Review before use: Read the platform's current rules before using scheduling, automated messages or audience data.

14. Email campaign improvement plan

Help me improve one email campaign without claiming a guaranteed lift in open, click or sales rates. Use the following campaign purpose, audience, current measures and constraints.

Propose: two or three testable subject-line approaches; a clear message structure; meaningful segments based on information we are entitled to use; an A/B test plan with one main variable at a time; success and safety measures; and a report template. Explain what sample size and observation window I should record, but do not make statistical claims without sufficient data.

Write draft copy using placeholders for factual claims. Include sender identity, a valid unsubscribe/opt-out route where required, and a final human review for accuracy and tone.

Platform: [platform]

Audience and relationship: [details]

Purpose: [purpose]

Current baseline/observation period: [figures]

Offer or information: [accurate description]

Review before use: A better subject line cannot fix an irrelevant or non-compliant campaign. Keep records of the lawful basis and opt-outs where personal data is processed.

15. Paid advertising experiment planner

Create a cautious paid-advertising test plan for [product/service] on [platform]. Do not assume that AI targeting, lookalike audiences or behavioural targeting is suitable, available or lawful for my case.

Start with: objective; offer; landing-page promise; audience hypothesis; exclusions; creative evidence; budget ceiling; measurement method; and decision rule. Then suggest a small test matrix for audience, message and creative, changing one meaningful variable at a time. Include checks for platform policy, audience-data permissions, sensitive-category restrictions, tracking/cookie requirements and misleading claims.

Show how to report spend, impressions, clicks, enquiries, qualified enquiries and sales separately. Explain that attribution is an estimate and not proof that an AI feature caused a result.

Budget: [amount and period]

Current data available: [summary]

Target audience: [description]

Product/service and limitations: [details]

Review before use: Verify current platform advertising policies, data-use settings and local legal obligations before launching. Do not upload customer lists or create audience segments without authority.

4. Customer-service prompts

16. Website assistant design brief

Create a design brief for a small-business website assistant that answers a narrow set of routine questions. First help me decide whether a clearer FAQ, enquiry form or human inbox would be safer than a chatbot.

If an assistant is justified, define: allowed topics; approved source content; prohibited topics; tone; handover to a named role or route; opening disclosure that it is automated; testing cases; monitoring; and a way to switch it off. Include example flows for a routine question, an unclear question, a complaint and a request outside its scope.

Do not let it give legal, medical, financial, safety-critical or employment advice; make binding promises; quote a price unless approved; collect unnecessary personal data; or claim 24/7 human availability. Keep answers short and direct people to a human when uncertain.

Business and website purpose: [details]

Common questions: [topics]

Current support route: [details]
 Approved content available: [details]

Review before use: Test with misleading, ambiguous and out-of-scope questions. Check that the handover route works during actual business hours.

17. Out-of-hours support boundary

Help me design an out-of-hours support arrangement for [business type] that is honest about availability. Make a table that distinguishes: information a self-service assistant may provide; cases that go into a queue; cases requiring an urgent human route; and cases we cannot handle through this channel.

For each category, specify trigger; customer-facing wording; information to collect; retention/access question; owner; response expectation stated as a target, not a guarantee; and manual escalation. Include a script that identifies the automated service and never implies that a person is actively monitoring it when they are not.

Support hours: [hours]
 Common enquiries: [list]
 Existing tools/team: [details]
 Any safety or emergency boundaries: [details]

Review before use: Do not offer emergency, safeguarding or time-critical support through an unmonitored chatbot. Publish a clear alternative route where appropriate.

18. Proactive customer-contact planner

Help me plan a proportionate proactive customer-contact programme for [business type]. First identify service-related triggers that are genuinely helpful, such as an unresolved enquiry, a booked review, an expiring consent or a requested update. Do not treat all behavioural data as permission to market.

For each proposed contact, provide: trigger; purpose; eligible audience; data used; channel; permission/lawful-basis question; message outline; human review; frequency cap; opt-out/objection handling; and measure. Explain where we should not automate contact, including complaints, vulnerability indicators, sensitive matters and disputed accounts.

Customer journey: [summary]
 Current contact process: [summary]
 Data available: [high-level description]
 Desired service outcome: [outcome]

Review before use: Current ICO guidance distinguishes corporate subscribers from sole traders and certain partnerships, and UK GDPR may apply to identifiable business contacts. Recheck the guidance before marketing outreach.

19. Customer feedback organiser

Create a repeatable, privacy-conscious process for turning customer feedback into improvement actions. We receive feedback through [channels] and currently [process].

Design a process that: collects only the information needed; removes names and account details before AI-assisted theme analysis where possible; identifies themes and examples; separates urgent service recovery from general learning; scores frequency and potential impact; assigns an owner; records an action; and checks whether a change helped. Provide a one-page weekly report format.

Ask me to decide who can access raw feedback, how long it is retained and how customers can raise a complaint or data-rights request. Do not treat automated sentiment as a definitive judgement of a customer or employee.

Primary goal: [service/product improvement goal]

Review before use: Keep sensitive complaints and personal data out of general prompts. Have a human read a sample of feedback before acting on themes.

20. Customer-service knowledge and quality guide

Help me create a knowledge and quality guide for an AI-assisted customer-service process. Build it from approved, current business information only.

Include: purpose; brand voice; permitted sources; answer format; facts that must be checked; prohibited claims; examples of good and unsafe replies; escalation criteria; complaint handling; feedback capture; change-control process; and a quality-review checklist. For every rule, state who owns it and how often it is reviewed.

Create a small test set with routine, unclear, angry, out-of-scope and privacy-related questions. Require the assistant to say “I’m not sure” and hand over rather than invent an answer. Do not describe this as training the model unless it is actually a separate provider training process.

Business/service values: [details]

Recurring enquiries: [topics]

Authoritative documents: [titles/locations]

Human handover route: [role/channel]

Review before use: Changes to prices, policies, services or source documents need a fresh review and testing pass.

5. Data, reporting and decisions

21. Management dashboard brief

Help me design a small management dashboard for [business type]. Start with the decisions I need to make, not a list of every available metric. Ask what data is already reliable enough to use.

Recommend up to [number] measures across [sales / delivery / stock / cash / customer service], with a definition, data source, owner, update frequency, direction of concern and practical question each measure answers. Suggest an accessible chart type only where it adds clarity. Include a data-quality check and a note of what the dashboard cannot show.

Do not claim real-time reporting is necessary or possible unless the source systems support it. Do not set universal thresholds. Ask me to define thresholds from our own baseline and risk tolerance.

Decisions we need to make: [list]
 Current data sources: [systems/spreadsheets]
 Known data-quality gaps: [gaps]
 Users: [roles]

Review before use: A neat chart can hide missing data or a changed definition. Record the source and date for every important measure.

22. Forecasting feasibility check

Assess whether [sales / demand / stock / staffing / customer behaviour] is a sensible forecasting problem for my business. Explain in plain English what a forecast can and cannot do.

Ask about: the specific decision; historical data; consistency of definitions; unusual events; seasonality; data volume; missing values; impact of a wrong forecast; and human override. Then provide a staged plan: simple baseline method; data-cleaning steps; test/hold-out period; accuracy measures; practical review; and decision rule.

Do not promise accurate predictions or suggest that a complex AI model is automatically better than a simple baseline. Do not recommend using forecasts for high-impact decisions without suitable expertise and safeguards.

Prediction question: [question]
 Available data and period: [summary]
 Where it is stored: [system]
 Decision affected: [decision]

Review before use: Compare any model with a simple approach, such as last year's equivalent period or a rolling average, and monitor actual outcomes.

23. Customer grouping worksheet

Help me create a responsible customer-grouping worksheet for [business type]. Start by defining the service or marketing decision that grouping would improve. Use only data we are entitled to use, and avoid sensitive characteristics or proxies for them.

Suggest practical grouping criteria such as product/service used, enquiry type, purchase recency, support need or stated preference where appropriate. For each proposed group show: business purpose; data fields; evidence/quality check; potential unfairness or privacy question; permitted action; human review; and how we will know whether it helped.

Do not label people as "valuable" or make automatic high-impact decisions from a segment. Keep a route for someone to query or correct relevant information.

Available data: [summary]

Decision to improve: [decision]

Known constraints: [constraints]

Review before use: A segment is an operational aid, not a fact about a person. Check whether the data is current, accurate and relevant.

24. Stock and ordering review

Help me design a stock-review process for [retail / wholesale / parts-based business] that uses historical information carefully. Create a simple framework for: sales history; seasonality and one-off events; supplier lead time; minimum stock; reorder point; slow-moving stock; stockout risk; and a human approval before an order is placed.

State the data fields needed, how often to review them, and how to test a recommendation against current knowledge such as promotions, supplier disruption or a change in product range. Make clear that an AI forecast cannot guarantee availability or prevent overstock. Include a manual spreadsheet-friendly option.

Products/SKUs: [approximate number]

Current system: [system/method]

Key issues: [stockouts/excess/lead-time uncertainty]

Order approver: [role]

Review before use: Never permit an automated system to place material purchase orders without agreed limits and an accountable human approval.

25. Decision brief with AI input

Help me prepare a decision brief for [decision]. Do not make the decision for me. Structure the brief with: decision statement; deadline; decision owner; options including “do nothing”; evidence available; information missing; assumptions; costs; benefits; risks; affected people; legal/contractual/security questions; small test option; and review date.

Where useful, ask for a simple decision matrix with criteria and weights that I can change. Keep the AI’s recommendation separate from the evidence. Highlight where a qualified adviser or accountable manager must decide.

Decision: [description]
 Options already considered: [options]
 Evidence/data: [summary]
 Constraints: [budget/time/contracts]
 What a poor outcome would look like: [description]

Review before use: Record who made the decision and why. AI-generated wording is not evidence by itself.

6. Team adoption and controlled implementation

26. Team learning plan

Create a beginner-friendly learning plan for a team introducing [tool/workflow]. The team includes [roles] and confidence ranges from [level] to [level]. Keep sessions short and tied to real, permitted tasks.

Build a plan with: purpose and boundaries; baseline confidence check; role-specific practice; examples of safe and unsafe input; how to check output; how to report an error; where to find the SOP; and an adoption review. For each session list owner, duration, input, exercise, expected output and human help available.

Address concerns honestly: the tool may change tasks, but no one should be asked to use it before they understand its limits. Do not claim productivity gains as a promised outcome.

Workflow and business purpose: [details]
 Tools being considered: [tools]
 What staff must never input or delegate: [boundaries]

Review before use: Give staff a safe place to say a workflow is confusing or unsafe. Do not measure adoption only by log-in counts.

27. Change conversation and rollout plan

Create a small-business change plan for introducing [workflow/tool]. Aim for clarity, not hype. Include: why we are considering the change; what will and will not change; people affected; known uncertainties; training/support; consultation points; pilot boundary; feedback route; decision-maker; and review dates.

Provide a first team briefing, a manager checklist and a short FAQ. Include respectful responses to concerns about workload, accuracy, customer experience, job changes and data. Do not tell staff that AI will replace them or promise that it will not affect work unless that is a confirmed, truthful position.

Team: [roles]

Current attitude/concerns: [summary]

Proposed tool/workflow: [details]

Pilot scope: [details]

Review before use: Employment, consultation and contractual changes may need professional HR or legal advice. Tell people what is known, assumed and still being tested.

28. AI-assisted workflow SOP creator

This produces a working draft. An SOP should be checked by the process owner before it is used.

Create a beginner-friendly standard operating procedure for [workflow]. Use numbered steps and plain language. The people using it have [technical confidence level].

Include: purpose; trigger; input; owner; tools/accounts required; allowed data; step-by-step actions; expected output; quality check; handover; record to keep; common errors; exception rules; human escalation; manual fallback; and review date. Clearly mark any step that is only a draft suggestion and must be approved by a person.

Add a quick-start checklist and a test checklist using fictional or approved test data. Do not assume buttons, integrations or provider features exist without confirmation.

Workflow description: [details]

Users: [roles]

Authoritative source documents: [locations]

Actions that need approval: [actions]

Review before use: Walk through the SOP with the person who does the work. Version it when the prompt, model, source material or integration changes.

29. Implementation problem solver

Help me troubleshoot an AI-assisted workflow that is not working as expected. Do not jump straight to a fix. First create a simple incident record: what changed; what should have happened; what happened; when; affected users/records; urgency; evidence; and whether we can safely pause the workflow.

Then give a prioritised diagnostic path covering: access/permissions; provider status; integration connection; data quality; prompt/source instructions; duplicate events; rate/usage limits; human-review bottleneck; cost; and staff adoption. For each check, say who should perform it, what evidence to collect, what not to change yet and when to escalate to the provider or a specialist.

End with a rollback or manual fallback plan and a learning record. Do not advise changing live credentials in a prompt.

Tool/workflow: [details]
 Observed problem: [details]
 Recent changes: [details]
 Impact and urgency: [details]

Review before use: If there is possible data exposure, fraud, unsafe action or material customer harm, pause the relevant process and follow your incident/escalation procedure rather than experimenting in production.

30. Responsible AI and privacy review

Create a proportionate pre-use review for an AI-assisted process in a UK small business. This is not a compliance certificate. Structure it as a list of questions and evidence to collect.

Cover: business purpose; data categories; whether personal or special-category data may be involved; data minimisation; lawful-basis and privacy-information questions; controller/processor roles; provider terms and retention; access control; security measures; accuracy and human review; fairness/bias; transparency to customers/staff; complaints and individual-rights route; international transfers; record retention/deletion; incident response; testing; and decision owner.

Highlight when I should pause and seek specialist data-protection, legal, security or sector advice. If the use could create high risk for people, prompt me to assess whether a DPIA is required before processing. Do not declare the process UK GDPR compliant.

Proposed process: [description]
 Data involved: [high-level categories]
 People affected: [groups]
 Providers/tools: [names]
 Decision owner: [role]

Review before use: The ICO's AI guidance covers accountability, transparency, lawfulness, accuracy, fairness, security/data minimisation and individual rights; it is currently under review following the Data (Use and Access) Act. Recheck current official guidance before implementation.

7. Measurement, scaling and future choices

31. Outcome and cost tracker

Create a monthly tracker for one AI-assisted workflow: [workflow]. Help me measure the whole process, not just the tool's output.

Include baseline and current measures for: task volume; elapsed time; human review time; corrections/rework; exceptions; customer or staff feedback; direct software/usage cost; support time; outage/fallback use; and any clearly evidenced commercial effect. Define every measure, its source, owner, observation period and limitation.

Create a simple monthly review format that separates: observed facts; estimates; external changes; what we learned; and the decision to continue, revise, pause or stop. Do not attribute revenue, cost reduction or customer satisfaction to AI without a credible comparison and explanation of other factors.

Baseline information: [details]

Current workflow cost: [details]

Review period: [period]

Decision we need to make: [decision]

Review before use: Do not hide correction time or third-party charges. A slower but safer process may be the right outcome for a higher-risk task.

32. Readiness-to-expand assessment

Create a readiness assessment for expanding an existing AI-assisted workflow from [current scope] to [proposed scope]. Score each item as ready, partly ready, not ready or unknown, with evidence required.

Assess: whether the first use case actually works; volume and demand; quality/exception rate; staff capability; documented SOP; human review capacity; data quality; permissions; supplier/tool limits; costs; security/privacy review; support owner; manual fallback; change-control process; and a clear business purpose for expansion.

At the end, recommend only one of: stay at current scope; run a limited test; resolve named gaps; or stop. Include a no-expansion option. Do not equate high staff enthusiasm or a successful demonstration with production readiness.

Evidence from current workflow: [summary]

Proposed expansion: [summary]
 Constraints: [constraints]

Review before use: Expansion changes the risk as well as the workload. Retest permissions, edge cases and support arrangements.

33. Advanced-use roadmap

Help me consider a more advanced AI use case such as forecasting, customer analysis, inventory support, tailored content or management reporting. Begin by checking whether a simpler process or rule would solve the problem.

If the use case remains worthwhile, create a staged roadmap: define decision and boundary; assess data and governance; create a low-risk prototype; test against a baseline; review accuracy, fairness, cost and human workload; decide whether to use it more widely; and plan monitoring/change control. For each stage include owner, evidence, go/no-go condition and fallback.

Avoid advice to deploy autonomous actions, customer commitments or high-impact decisions without appropriate specialist design, authority and testing. Do not promise predictive accuracy or personalisation results.

Potential use case: [description]
 Current capability/data: [summary]
 Decision supported: [decision]
 Risk if wrong: [description]
 Budget/capacity: [range]

Review before use: Advanced does not mean better. A small, well-controlled improvement can be more valuable than a complex system nobody can maintain.

34. Competitor and market observation framework

Create a lawful, ethical framework for observing how comparable businesses communicate about AI or customer service. Use public information only and do not suggest deception, scraping against terms, impersonation or copying protected content.

Create a table with: organisation; public observation; source/date; customer problem addressed; claimed capability; evidence shown; possible customer expectation; relevance to us; risk of copying; and question to investigate. Then help me identify our own service gap or differentiator based on what we can actually deliver.

Make clear that a competitor's claim is not proof of effectiveness, legality or suitability. Do not recommend sharing confidential information or making unverified comparative advertising claims.

Industry: [industry]

Comparable businesses: [names or types]
 Our current offer/process: [description]

Review before use: Keep a source link and date for every observation. Do not use a rival's brand, content or customer data without permission.

35. Integration improvement plan

Help me improve an existing group of tools without creating a fragile, over-automated system. Map our current information flow across [tools/processes]. Identify duplicate entry, conflicting sources of truth, hand-off delays and access risks.

For each possible improvement, show: business problem; data involved; source of truth; owners; connection option to verify; expected benefit; cost/effort; privacy/security check; testing method; monitoring; and manual fallback. Prioritise changes using business impact and risk, not novelty.

Do not recommend that all tools share all data. Do not assume an integration is available, secure or included in a subscription. Flag any action that could overwrite records, send messages, change prices, take payments or expose data for explicit approval.

Tools and current flow: [details]
 Most painful hand-offs: [details]
 Technical confidence: [level]

Review before use: Make one controlled change at a time. Document field mappings and keep a way to disable the connection.

8. Newer channels and strategic exploration

36. AI trend filter

Create a monthly AI trend-review routine for a [business type]. I want to distinguish useful developments from sales hype.

Recommend credible source types to monitor, then create an assessment template for each item: what has changed; original source/date; possible business problem addressed; maturity/availability to verify; data/security questions; cost/skill requirement; impact if it fails; small test; and reason to ignore or revisit. Include a rule that no trend becomes a project without a named problem owner and success measure.

Do not claim that a trend will create competitive advantage or pressure me to adopt it quickly. Keep the review to [time] per month.

Industry and business priorities: [details]
 Current tools/capability: [details]
 Areas of interest: [details]

Review before use: Prefer primary provider documentation, official guidance and your own test evidence over influencer summaries or vendor claims.

37. Voice-service feasibility planner

Assess whether a voice-based AI service is appropriate for [business process]. Begin with the customer need and a non-AI alternative. If we continue, create a staged plan covering: permitted use cases; caller disclosure and identity; recording/transcription question; consent/privacy information; script and knowledge sources; handover to a person; accessibility and language needs; failure handling; call logs and retention; testing; cost limits; and an emergency/urgent-case exclusion.

The system must not impersonate a person, make binding commitments, take sensitive payment details unless a suitable approved process exists, give regulated advice or create a false impression that a human is available. Flag telephone/direct-marketing rules as a separate current compliance check.

Business process: [details]
 Caller types: [details]
 Current phone arrangement: [details]
 Risk/urgency boundaries: [details]

Review before use: Use an obvious pilot route and listen to test calls. Check current provider terms and UK privacy/marketing rules before recording, transcribing or making outbound calls.

38. AI-assisted video workflow

Create a modest workflow for producing [marketing / training / explainer] videos with AI assistance. I need a process that protects accuracy, consent and brand trust.

Include: purpose and audience; source material; script outline; fact/claim check; brand and accessibility checks; permission for people, voices, images and music; disclosure/label question where appropriate; production steps; reviewer; caption/transcript requirement; distribution; and a simple measure. Identify where a human spokesperson, subject expert or editor must approve.

Do not use a person's likeness or voice without clear permission. Do not create testimonials, product demonstrations or customer results that did not happen. Do not claim a generated video is a recording of an actual event.

Video purpose: [details]
 Audience: [details]

Available legitimate assets: [details]

Brand boundaries: [details]

Review before use: Watch the final version with sound on and off. Check captions, factual wording, licences/permissions and any platform labelling rules.

39. Personalised customer-experience review

Help me improve a customer journey with proportionate personalisation. Start by identifying a real service problem, then determine whether personalisation is necessary.

For each proposed improvement, specify: customer stage; helpful action; minimum data needed; source and accuracy check; consent/lawful-basis/privacy question; who can access it; how a customer can change preferences; human alternative; risk of unfair or intrusive treatment; measurement; and stop condition. Prefer customer-provided preferences over inferred sensitive information.

Do not use AI to manipulate, pressure or make high-impact decisions about people. Do not describe an action as personalised if it only uses a broad assumption. Keep a non-personalised route available where reasonable.

Business/customer journey: [summary]

Current data: [high-level categories]

Problem to solve: [description]

Desired helpful outcome: [description]

Review before use: Recheck UK data-protection and marketing guidance before processing personal data for a new purpose or adding tracking.

40. Business-direction decision workbook

Help me explore a possible new service, product line or business direction: [idea]. Treat this as a decision workbook, not a market forecast or investment recommendation.

Structure the output around: customer problem; evidence of demand; current capabilities; gaps/partners needed; alternatives; competitor/public-market observations; costs and resources; risks; legal/regulatory questions; assumptions; simple scenarios; smallest reversible experiment; success/failure criteria; decision owner; and review date.

Make a clear distinction between research evidence, assumptions and ideas generated by AI. Do not predict revenue, market size, profitability or customer uptake unless I supply a credible source and method. Include “do not proceed yet” as a valid option.

Current business: [description]

Idea under consideration: [description]
Evidence we have: [sources/observations]
Constraints: [cash/time/skills]

Review before use: Validate the problem with appropriate real-world research and customers before committing material spend or changing a regulated service.

9. Your practical implementation workbook

Complete these pages after using the relevant prompts. They turn an AI conversation into a decision and an accountable next step.

One-process selection sheet

Field	Your notes
Process and current owner	
Customer or business problem	
Evidence of the problem (source/date)	
Current steps, time and volume	
Non-AI improvement considered	
Proposed AI-assisted step	
Data and permissions to check	
What AI must not do	
Human reviewer and approval point	
Manual fallback	
Smallest safe test	
Decision date and owner	

Pilot card

Item	Record before starting
Outcome and boundary	
Trigger/input and expected output	
Approved test data and source	
Tool/account owner	
Provider feature/terms checked	
Quality and safety checks	
Error, complaint or incident route	
Support/monitoring owner	
Costs and usage limit	
Stop/rollback condition	
Review date and decision	

Short operating procedure template

SOP component	Write it plainly
Purpose and who uses it	
Trigger and allowed input	
Step 1–5	
Required human check	
Output and where it is stored	
What to do if uncertain or wrong	
Manual method	

SOP component	Write it plainly
Owner and review date	

Monthly evidence review

Measure	Baseline	This month	Source/period	What it means	Action/owner
Task volume					
Total process time					
Human review/ corrections					
Exceptions or fallback use					
Direct tool/ usage cost					
Staff/customer feedback					
Decision: continue, revise, pause or stop					

10. UK privacy, outreach and security reminders

These are prompts to pause and check, not a substitute for a compliance programme.

- **Customer and staff data:** Keep it out of general AI prompts unless there is a documented reason, authority and an appropriate provider arrangement. Use the minimum data that solves the task, control access, and have a route to correct mistakes.
- **AI transparency and decisions:** Explain the AI's role where it matters. Keep human judgment for consequential decisions. Test for inaccurate, unfair and out-of-scope outputs.⁴

- **B2B outreach:** The ICO explains that companies and LLPs are generally corporate subscribers, while sole traders and certain partnerships are individual subscribers. Rules for electronic marketing differ, and UK GDPR can still apply when you use identifiable business-contact data. For corporate electronic mail, do not conceal identity; provide a valid opt-out route and respect objections. Guidance is under review, so recheck it before a campaign.¹
- **Access and account safety:** Use business-controlled accounts where possible, restrict access to the people who need it, and remove access when roles change. The NCSC provides small-organisation guidance on backups, devices, accounts and scams, plus MFA guidance for corporate online services.²
- **Security incidents:** Do not paste credentials or live incident details into a general assistant. Pause risky activity, follow your organisation's incident process and seek appropriate specialist help.

Publication and use notice

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References and verification notes

1. [Information Commissioner's Office — Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)
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2. [National Cyber Security Centre — Small organisations guide to cyber security](https://www.ncsc.gov.uk/collection/small-organisations-guide-to-cyber-security)
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3. [National Cyber Security Centre — Multi-factor authentication for your corporate online services](https://www.ncsc.gov.uk/collection/mfa-for-your-corporate-online-services)
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4. [Information Commissioner's Office — Guidance on AI and data protection](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/)
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Editorial date: 9 October 2026. The ICO's B2B marketing and AI/data-protection pages are under review following the Data (Use and Access) Act. Platform features, terms, prices and official guidance can change; recheck primary sources before implementation. The fictional example and all blank figures in this edition are illustrative only.