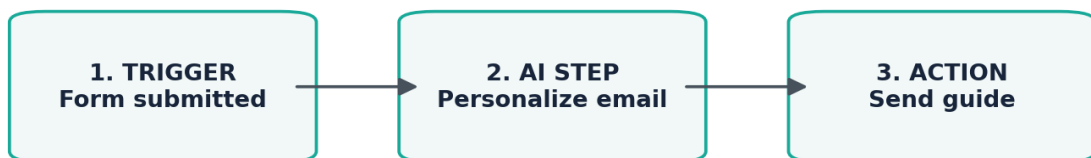


LEVER & LOOP

The AI Quick-Start Guide

A practical, visual guide to using AI and simple automation in a small business
- with examples, prompts and a 7-day action plan.

For small business owners, freelancers and entrepreneurs.
No coding required. Start with one repetitive task and turn it into a smarter workflow.



One trigger + one AI task + one action can already create value.

Practical AI. Simple automation. Better workflows.

01 - START HERE

What AI is actually good at

Think of AI as a fast first-draft partner. It is excellent at transforming information, spotting structure and producing usable drafts. It is not a substitute for judgment.

WRITE

Emails, replies, product descriptions, FAQs, social posts and outlines.

SUMMARIZE

Meeting notes, customer feedback, long messages and research.

ORGANIZE

Turn messy text into categories, checklists, tables and action items.

TRANSFORM

Rewrite by tone, shorten, expand, translate or repurpose content.

Example

Before: 12 lines of rough notes after a customer call.

With AI: a 5-line summary + action items + a polished follow-up email.

Human step: verify facts, pricing and promises before sending.

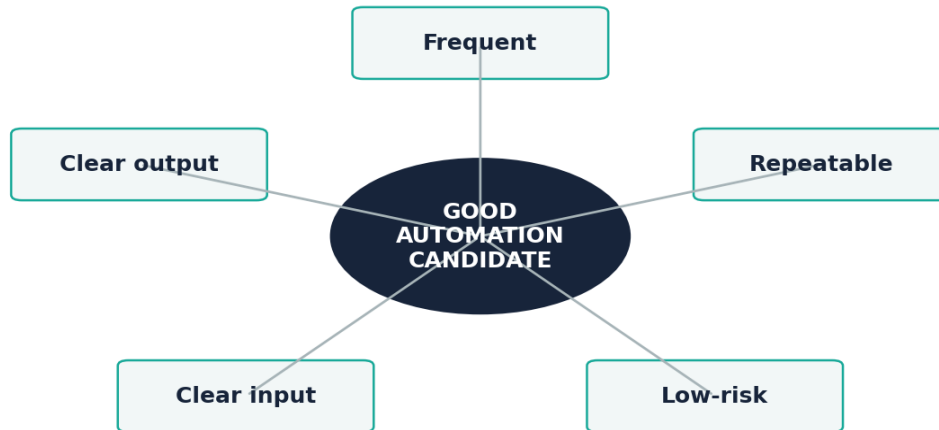
Avoid using AI blindly for

- Final legal, financial or medical decisions.
- Sensitive customer data without appropriate safeguards.
- Facts that must be current unless you verify them.
- High-impact decisions where context and accountability matter.

02 - PICK THE RIGHT TASK

Find your first automation opportunity

The best first workflow is boring in a good way: frequent, predictable, low-risk and easy to check.



Question	Score 0-2
Does this happen several times a week?	0 / 1 / 2
Are the steps mostly the same each time?	0 / 1 / 2
Is the input easy to identify?	0 / 1 / 2
Is the desired output clear?	0 / 1 / 2
Can a mistake be caught before harm is done?	0 / 1 / 2

8-10: strong first candidate. 5-7: simplify it first. 0-4: choose another task.

03 - PROMPT BETTER

A simple formula for better AI output

A vague request creates a vague answer. Give AI a role, task, context, output format and constraints.

ROLE	Who should AI act as?
TASK	What should it do?
CONTEXT	What should it know?
OUTPUT	What format do you want?
CONSTRAINTS	What must it follow?

Copy this prompt:

You are a customer support assistant for a small online business.

Task: Write a reply to the customer message below.

Context: Be helpful, calm and concise. Never promise a refund unless policy allows it.

Output: Email reply, maximum 120 words.

Constraints: Simple English. Confirm the main issue. End with one clear next step.

Customer message: [PASTE MESSAGE]

Tip: Save prompts that work. A reusable prompt is a tiny business asset.

04 - USE CASES

5 small-business examples you can copy

Use case	Input	AI step	Output
Customer enquiry	Customer email	Identify intent + draft reply	Reviewed response
Lead follow-up	Form submission	Personalize message	Follow-up email
Content repurposing	One article or idea	Extract key points	3 posts + email
Meeting admin	Notes/transcript	Summarize decisions	Actions + owners
FAQ building	Repeated questions	Group and rewrite	Clean FAQ draft

Mini example: turning a lead into a useful email

Form: Name = Maya; Interest = saving time on admin.

AI instruction: Thank Maya, mention her goal, give one useful tip, then deliver the requested resource.

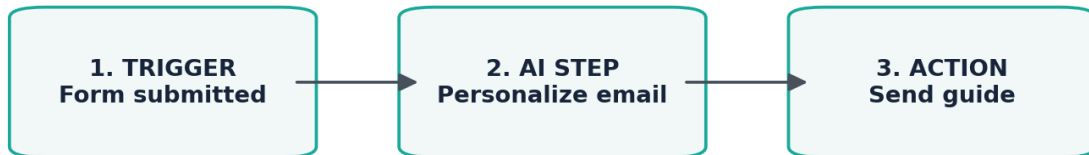
Result: a relevant email instead of a generic autoresponder.

The goal is not to make every message sound AI-generated. The goal is to make a useful human experience easier to deliver consistently.

05 - BUILD IT

Your first 3-step AI automation

You can create real value with only three connected steps.



One trigger + one AI task + one action can already create value.

Example workflow: Free guide delivery

- Trigger: Visitor submits name and email on a form.
- AI step: AI writes a short personalized delivery message.
- Action: Email service sends the message and guide link.
- Check: Test with your own address before publishing.

Why this works: the form collects structured data, AI personalizes the communication, and the email step delivers a consistent result automatically.

Good workflow design

- Use the fewest steps needed.
- Name fields clearly: Name, Email, Topic, etc.
- Keep important links and facts outside AI-generated text when possible.
- Log failures and test unusual inputs.
- Add human approval for high-risk actions.

06 - EXAMPLE

Before and after: a better automated email

Generic version

Hi,

Thanks for signing up. Here is your guide.
We hope you enjoy it.

Regards

Improved version

Hi Maya,

Thanks for requesting the Lever & Loop
AI Quick-Start Guide. Your guide is ready.

A useful place to begin: choose one
repetitive task you do every week and
test AI on that before trying to automate
everything.

Use the button below to open your guide.

The Lever & Loop Team

What improved?

- Uses the person's name.
- Reminds them what they requested.
- Gives one immediate useful tip.
- Uses a clear next action.
- Avoids invented claims and unnecessary fluff.

Important: Let AI personalize the copy, but keep your download URL controlled by the workflow or email template so the model cannot invent a link.

07 - MULTIPLY YOUR WORK

Turn one idea into a mini content system

AI can help you reuse good thinking instead of starting from zero on every channel.

One source	AI transforms it into
A 5-minute voice note	LinkedIn post + email + short video outline + FAQ
Customer question	FAQ answer + social post + onboarding tip
Case study notes	Story post + sales email + website proof point

Repurposing prompt

Turn the source material below into:

- 1) one 120-word email,
- 2) three short social posts with different hooks,
- 3) five FAQ questions and answers.

Keep the meaning accurate. Do not invent facts, numbers, testimonials or results. Use simple English and avoid hype.

SOURCE: [PASTE HERE]

Review every output against the original source. AI is useful for transformation, but the source remains your truth.

08 - ACTION PLAN

Your 7-day AI quick-start sprint

The goal for this week is not mastery. It is one working, tested workflow.

Day	Focus	Action
1	Find	List 5 repetitive tasks. Choose one low-risk task.
2	Prompt	Create one reusable prompt and test it on 3 examples.
3	Refine	Improve tone, format and constraints until output is reliable.
4	Document	Write the manual process as a short checklist.
5	Connect	Build Trigger -> AI -> Action.
6	Test	Try normal, incomplete and unusual inputs.
7	Measure	Estimate time saved and decide what to improve next.

Success metric: 'This workflow reliably saves me time or reduces repetitive effort' is more useful than 'I used the newest AI tool.'

09 - KEEP GOING

Your AI + automation checklist

Use this page whenever you build a new workflow.

- ☐ Is the business problem clear?
- ☐ Is the task repetitive enough to automate?
- ☐ Are the inputs structured and understandable?
- ☐ Does the prompt specify the desired output?
- ☐ Can important facts be verified?
- ☐ Is sensitive data handled appropriately?
- ☐ Is there a human check where risk is high?
- ☐ Have I tested at least 3 realistic examples?
- ☐ Do I know what happens if a step fails?
- ☐ Can I measure whether this workflow is actually useful?

Your next move:

Pick one workflow from this guide and make it work end-to-end. Then improve it before adding more tools.

LEVER & LOOP

Practical AI automation systems and digital products for small businesses and entrepreneurs.

© 2026 Lever & Loop. Educational material. Always review AI-generated output before relying on it for important decisions.