

SharedTEAMS®

AI GUIDEBOOK FOR SMALL BUSINESSES

This guide is your all-in-one playbook for using AI tools to boost productivity across marketing, accounting, and IT, with expert prompts, practical tips, and smart strategies that actually work.

WHY AI MATTERS

Discover how AI boosts efficiency, saves time, and opens new growth opportunities across marketing, IT, and finance.

REAL-WORLD USE CASES

See how small businesses are using AI to solve problems, automate tasks, and drive better results with less effort.

WORKFLOWS & TOOLS

Get step-by-step guides and prompt libraries to start using AI for everyday business tasks. No tech expertise needed.

TIPS, TROUBLESHOOTING & BEYOND

Explore creative ways to refine AI output, Troubleshoot odd results, and blend AI with human insight for best outcomes.



WHY AI MATTERS

Making Small Business Operations More Efficient with AI

Artificial Intelligence (AI) is no longer a tool reserved for large enterprises—it's become an accessible, game-changing resource for small businesses looking to optimize their operations. Whether you're looking to improve marketing, IT efficiency, or accounting workflows, AI tools offer powerful solutions to save you time, reduce costs, and improve decision-making.

This guide can help you understand how to use AI in real-world situations and integrate these tools into your daily workflows. Let's look at how AI can support your Marketing, Accounting, and IT.

AI in Marketing: Automate, Optimize, & Personalize

Marketing is essential for business growth, but it can be time-consuming and resource-intensive. AI-powered tools streamline content creation, automate engagement, and optimize campaigns to enhance marketing effectiveness while maintaining brand consistency.

How AI Enhances Marketing Workflows:

AI-Powered Content Creation: Use LLMs and AI chatbots like ChatGPT to generate blog posts, email campaigns, social media captions, and ad copy quickly.

AI-Driven Visual Design: Platforms like Midjourney enable businesses to create high-quality graphics, logos, and product visuals without hiring a designer.

SEO Optimization: AI can generate keyword-rich blog content, meta descriptions, and social media captions to improve search rankings.

Automated Email & Ad Copywriting: AI personalizes email sequences, landing pages, and ad copy for different audience segments to maximize engagement.

Market Research & Strategy: AI analyzes competitors, identifies trends, and refines messaging strategies based on data insights.

Chatbot-Driven Customer Engagement: AI chatbots interact with customers in real-time, answering inquiries and guiding them through the sales funnel.

Why It Matters: AI makes marketing faster, smarter, and more cost-effective, giving small businesses the ability to execute high-level marketing strategies without requiring a large in-house team. While subject matter experts remain essential, AI tools can significantly boost efficiency and streamline processes.

AI in IT: Enhancing Efficiency & Security

Managing IT infrastructure can be challenging for small businesses, especially without a dedicated IT team. AI-powered tools, including large language models (LLMs), chatbots, and automation systems, simplify IT management, enhance security, and reduce the need for specialized expertise.



How AI Supports Small Business IT

AI Chatbots for IT Support:
AI-powered chatbots handle common IT issues, guide users through troubleshooting steps, and provide instant answers to tech-related questions.

Automated System Monitoring & Alerts:
AI continuously monitors networks, servers, and devices, detecting issues before they cause downtime.

AI-Driven Cybersecurity:
Machine learning models identify security threats, detect anomalies, and provide real-time protection against cyberattacks.

Automated Software Updates & Patch Management:
AI helps ensure software stays updated by automatically deploying patches and monitoring vulnerabilities.

Intelligent Data Backup & Recovery:
AI-driven solutions automate data backups, predict potential failures, and assist in quick disaster recovery.

AI-Powered IT Documentation & Knowledge Base:
LLMs generate IT documentation, FAQs, and troubleshooting guides, making it easier for employees to find solutions.

Predictive IT Maintenance
AI identifies patterns in hardware performance, predicting failures before they happen and reducing costly repairs.

Why It Matters: AI reduces IT burdens, enhances security, and minimizes downtime for small businesses. By automating IT processes, AI allows businesses to focus on growth rather than troubleshooting tech challenges.

AI in Accounting & Finance: Smart Money Management

Accounting and financial management are crucial for maintaining a profitable business. AI simplifies financial workflows, improves forecasting, and automates routine tasks to reduce errors and enhance decision-making.



How AI Supports Financial Management:



- **Automated Bookkeeping:** AI-powered tools categorize expenses, generate invoices, and reconcile transactions in real time.
- **Expense Tracking & Fraud Detection:** AI analyzes spending patterns to detect anomalies and flag potential fraud.
- **Payroll Automation:** AI streamlines payroll calculations, tax deductions, and compliance reporting, reducing administrative workload.
- **Financial Forecasting & Budgeting:** AI predicts cash flow trends, helping businesses plan for future expenses and investments.
- **Tax Preparation & Compliance:** AI tools help small businesses stay on top of tax deadlines, deductions, and regulatory changes to avoid penalties.
- **AI-Powered Financial Insights:** AI provides real-time financial reports, offering businesses a clearer picture of profitability and financial health.

Why It Matters: AI simplifies complex financial tasks, reduces errors, and helps small businesses make more data-driven financial decisions. By automating routine financial processes, business owners can focus on growth rather than administrative burdens.

Why Small Businesses Should Use AI Now

AI is no longer a luxury—it's a necessity for small businesses looking to stay competitive in today's fast-paced market. The key benefits of AI adoption include:

Time Savings

Automate repetitive tasks and free up hours of manual work.

Cost Efficiency

Reduce the need for large teams while maintaining productivity.

Data-Driven Decisions

Use AI insights to make smarter marketing, operational, and financial choices.

Scalability

Grow a business without increasing overhead costs.

Competitive Edge

Stand out in the industry by leveraging AI for innovation and efficiency.

Customer Experience

Deliver faster, more personalized service with AI-powered tools like chatbots and automated support.

AI in IT: Enhancing Efficiency & Security

Be Specific

Include as many details as possible in your prompts for more tailored results.

Iterate

Refine outputs with follow-up prompts to improve quality.

Leverage Context

Reference brand guidelines, operational handbooks, and past campaigns to ensure consistency.

Always Review AI Content

Double-check for accuracy, relevance, and tone to maintain consistency across platforms and internally.

Combine AI with Human Expertise

Remember, AI is a tool to assist—not replace—your team's creativity and judgment. Always have a human review and refine outputs to ensure they reflect your brand's identity and meet your standards.

Experiment and Optimize

Try out different AI-generated outputs, such as variations in tone, style, or messaging, and use A/B testing to determine what resonates best with your audience. Continuously refine based on performance insights to maximize impact.

REAL-WORLD USE CASES

Streamlining Small Business Tasks with AI

How can small businesses utilize AI tools like Large Language Models (LLMs) and AI-powered automation across Marketing, IT, and Accounting? Let's take a look.

AI in Marketing

How GreenEdge Pro Used AI to Run a High-Performing Google Ads Campaign

Business Challenge: GreenEdge Pro, a commercial lawn care company, needed a cost-effective way to attract B2B leads while optimizing their Google Ads campaign without a dedicated marketing team.

AI Solutions:

- **AI-Powered Research & Targeting:** AI-generated keyword lists and refined audience segmentation.
- **AI-Generated Ad Copy:** Created multiple high-converting ad variations instantly.
- **Smart Bidding & Optimization:** AI-driven real-time budget adjustments for maximum ROI.

Results: 30% lower cost per lead, 42% higher CTR, and better targeting of decision-makers.

Key Takeaway: AI streamlined ad creation, targeting, and budget management, enabling GreenEdge Pro to compete effectively.z

How AI Image Generators Helped TrendyThreads Create Viral Social Media Content

Business Challenge: TrendyThreads, an online fashion brand, needed a way to produce high-quality, eye-catching images quickly to stand out on social media.

AI Solutions:

- **AI-Generated Fashion-Themed Images:** Created custom visuals aligned with current trends.
- **AI-Powered Brand Customization:** Adjusted color schemes and seasonal elements for brand consistency.
- **Trend Prediction & A/B Testing:** AI analyzed engagement data to optimize content for virality.

Results: 50% faster content production, 3x higher engagement rates, and reduced costs on traditional photoshoots.

Key Takeaway: AI-powered image generation allowed TrendyThreads to create visually stunning, on-trend content at scale.

How AI Helped Local Bites Café Personalize Email Marketing & Boost Customer Retention

Business Challenge: Local Bites Café struggled with customer retention and wanted to increase repeat visits through personalized email offers.

AI Solutions:

- **AI-Generated Personalized Emails:** Segmented customers based on purchase behavior.
- **Automated Offer Recommendations:** AI suggested discounts tailored to individual buying habits.
- **Optimized Email Subject Lines:** AI tested variations to increase open rates.

Results: 30% increase in email open rates, 25% more repeat visits, and a 15% boost in revenue from returning customers.

Key Takeaway: AI-driven email marketing helped Local Bites Café engage customers with hyper-personalized promotions.

AI in Accounting

AI-Generated Financial Summaries – How SmallBiz Tax Services Used LLMs to Simplify Tax Season

Business Challenge: BlueWave Financial, a mid-sized accounting firm, faced inefficiencies in financial reporting and documentation.

AI Solutions:

- **Automated Report Generation:** AI compiled financial statements and formatted reports instantly.
- **AI-Powered Summarization:** Simplified complex financial data into client-friendly insights.
- **Standardized Documentation:** AI ensured compliance and accuracy across all financial reports.

Results: 80% faster report generation, 40% improved client understanding, and 30% fewer documentation errors.

Key Takeaway: AI automation saved accountants time while improving accuracy and client communication.

AI-Generated Financial Summaries – How SmallBiz Tax Services Used LLMs to Simplify Tax Season

Business Challenge: SmallBiz Tax Services needed to process large volumes of client tax data efficiently while minimizing errors.

AI Solutions:

- **AI-Powered Tax Summaries:** Extracted key financial details from tax documents.
- **Client-Friendly Report Generation:** Reformatted complex tax data into easy-to-read summaries.
- **AI Compliance Checks:** Identified inconsistencies, missed deductions, and tax liabilities.

Results: 40% reduction in processing time, faster client turnaround, cost savings on seasonal staff, and increased client satisfaction.

Key Takeaway: AI-powered automation allowed SmallBiz Tax Services to process tax filings faster and with greater accuracy.

How AI Helped SwiftBooks Automate Invoice Processing & Reduce Late Payments

Business Challenge: SwiftBooks, a small bookkeeping firm, faced delays in invoice processing and struggled with late payments.

AI Solutions:

- **Automated Invoice Generation:** AI created invoices instantly based on project details.
- **AI-Driven Payment Reminders:** Sent personalized follow-ups for overdue invoices.
- **Fraud Detection & Error Checking:** AI flagged duplicate invoices and potential errors.

Results: 40% reduction in late payments, 60% faster invoice processing, and improved cash flow management.

Key Takeaway: AI automated invoicing and follow-ups, ensuring timely payments and reducing admin workload.

AI in IT

How AI Helped Secure Small Business IT Infrastructure

Business Challenge: A growing IT services firm struggled with cybersecurity risks, including phishing attacks and weak password policies.

AI Solutions:

- **AI-Powered Threat Detection:** Monitored network activity in real time for security risks.
- **AI-Generated Password Policies:** Enforced strong, randomized passwords.
- **Automated Phishing Email Detection:** AI identified and flagged suspicious emails.

Results: 60% reduction in phishing attacks, improved password security, and better compliance with security best practices.

Key Takeaway: AI automated cybersecurity defenses, keeping small business IT systems safe from threats.

How AI Helped Secure Small Business IT Infrastructure

Business Challenge: QuickFix IT Solutions, a small IT support company, struggled with a high volume of support tickets and slow response times.

AI Solutions:

- **AI Chatbots for Help Desk Support:** Handled 70% of common IT inquiries instantly.
- **Automated Troubleshooting Scripts:** Provided users with self-service solutions.
- **Smart Ticketing System:** AI prioritized and routed support tickets efficiently.

Results: 50% reduction in ticket resolution time, improved customer satisfaction, and more efficient IT team workload management.

Key Takeaway: AI-powered automation enabled QuickFix IT Solutions to handle more support requests while improving service quality.

How AI Helped TechGuard Solutions Predict and Prevent IT System Failures

Business Challenge: TechGuard Solutions, an IT services provider, struggled with unplanned system outages affecting their clients.

AI Solutions:

- **Predictive Maintenance with AI:** Analyzed data to detect patterns indicating potential failures.
- **Automated System Health Monitoring:** AI continuously tracked server and network performance.
- **AI-Powered Ticket Prioritization:** Ranked IT support tickets based on urgency.

Results: 50% reduction in unplanned downtime, 35% faster issue resolution, and improved reliability for client IT systems.

Key Takeaway: AI-driven predictive maintenance helped TechGuard Solutions prevent IT failures before they occurred.

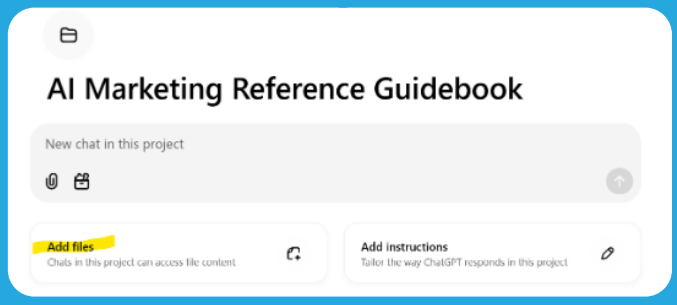
WORKFLOWS & TOOLS

Getting the Most from LLMs and AI Image Tools

This section provides an overview of how to use AI tools effectively in your Marketing, Accounting, and IT workflows.

Uploading Files to ChatGPT

Here are the best practices and use cases for using this feature effectively:



- **Upload only relevant files** to keep tasks clear and focused.
- **Provide context** on the file's purpose and what you need.
- **Break large files into sections** for better efficiency.
- **Verify AI-generated outputs** for accuracy.
- **Use cases include:** data analysis, content creation, editing, and trend reporting.
- **Avoid sensitive data** to maintain privacy.
- **Upload brand files** to guide tone, style, and formatting.
- **Ask ChatGPT to reference files** for consistency in project outputs.

Creating Prompts

To get the best results when communicating with AI tools:



- Craft prompts that are clear, specific, and provide relevant context.
- Use complete sentences, include necessary background details, and specify the desired format (e.g., bulleted list, table, or paragraph).
- Experiment with different phrasing and refine your prompts to improve accuracy.
- When appropriate, include examples or ask the AI to act as a specific persona.
- Always review and verify the accuracy of AI-generated content.

Example of prompt language after uploading files you would like to see that format mirrored in:

- Refer to the [guidelines document or messaging guide] in the Project Files for communication guidelines to ensure the tone and messaging align with expectations. Write unique, original content tailored to [specific topic], ensuring no direct duplication of text from referenced documents.
- Remember: Maintain the same balance of section lengths, explanatory styles, and content structure as found in the [reference document]. The output must total approximately [word count]."

Keyword Research & SEO

Instead of just asking for keywords, get specific.

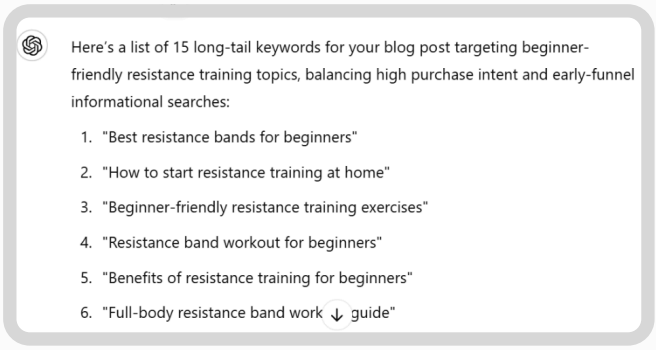
What do you want the keywords to be focused on?

Think about your target audience and their pain points.

Where is this piece of content in your funnel?

Long-Tail Keywords

I'm creating a blog post for a fitness brand about the benefits of resistance training for beginners. The goal is to target readers who are interested in starting a fitness routine and may want to purchase resistance bands or training equipment. Please generate a list of up to 15 long-tail keywords, focusing on a mix of high purchase intent (e.g., product-related searches) and early-funnel informational searches. Include keywords that align with beginner-friendly topics.

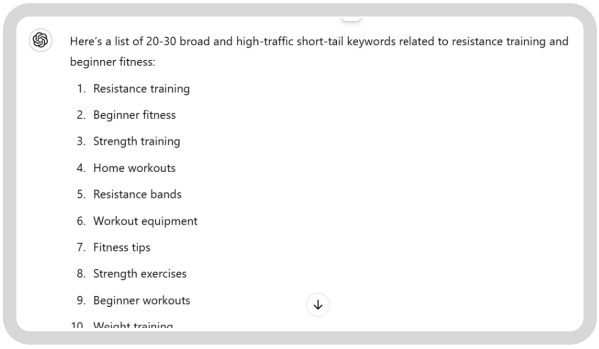


Here's a list of 15 long-tail keywords for your blog post targeting beginner-friendly resistance training topics, balancing high purchase intent and early-funnel informational searches:

1. "Best resistance bands for beginners"
2. "How to start resistance training at home"
3. "Beginner-friendly resistance training exercises"
4. "Resistance band workout for beginners"
5. "Benefits of resistance training for beginners"
6. "Full-body resistance band work guide"

Short-Tail Keywords

Please generate a list of 20-30 short-tail keywords related to resistance training and beginner fitness. Focus on terms that are broad and high-traffic, appealing to a general audience. Ensure the keywords align with the topic and cover relevant subtopics such as fitness equipment, resistance band exercises, and beginner workout tips. Avoid overly niche terms or phrases with very low search volume.



Here's a list of 20-30 broad and high-traffic short-tail keywords related to resistance training and beginner fitness:

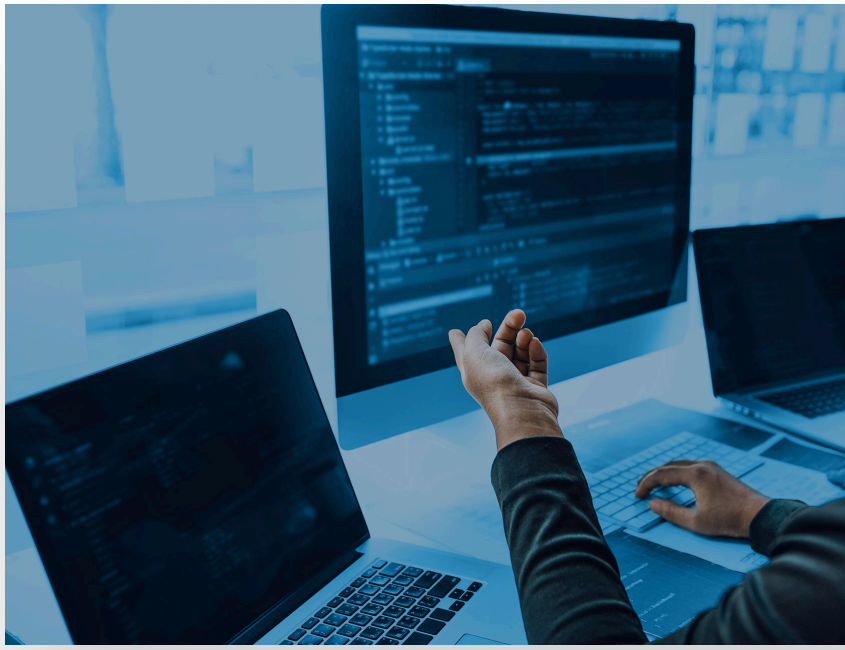
1. Resistance training
2. Beginner fitness
3. Strength training
4. Home workouts
5. Resistance bands
6. Workout equipment
7. Fitness tips
8. Strength exercises
9. Beginner workouts
10. Weight training

Meta Descriptions

Craft concise, keyword-rich meta titles and descriptions tailored to your content using AI:

Here's how to use it effectively:

- **Keep it short:** Aim for 120–160 characters so it displays fully in search results.
- **Use keywords naturally:** Include 1–2 relevant keywords to boost SEO visibility.
- **Be clear and compelling:** Explain what the page offers and why it's valuable.
- **Include a CTA:** Use action phrases like "Learn more," "Explore," or "Shop now" to encourage clicks.



Example Meta Description Prompt for ChatGPT

prompt:

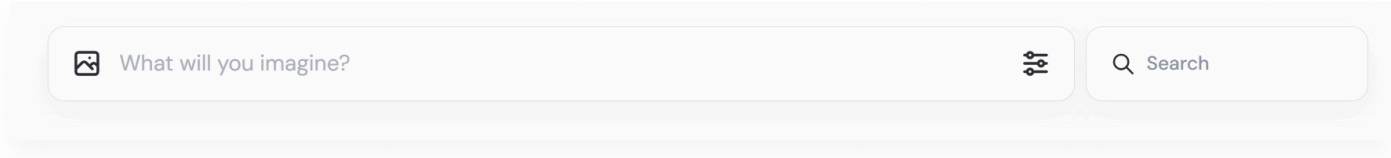
Write a 150-character meta description for a blog post on eco-friendly clothing trends. Include the keyword 'sustainable fashion' and a CTA.

Example Output

Explore top eco-friendly clothing trends in sustainable fashion. Find out how to make smarter choices and refresh your wardrobe. Read the guide today.

Tip: Write the blog first, then ask for a meta description or title in the same chat. Or upload the outline and reference it when making your request.

Creating Visual Content with AI Image Generators



MidJourney, Stable Diffusion, and DALL-E are AI tools for generating high-quality visuals from text prompts. You can use them to create social media graphics, website imagery, email headers, and more. By specifying details like style, color palette, and subject matter, you can bring your creative vision to life with minimal effort.

Writing Prompts for Visuals

The effectiveness of your AI-generated visuals depends on the clarity and detail of your prompts. Use the following structure for better results:



- **Gather Assets:** Collect logos, color palettes, typography, and reference images.
- **Define the Subject:** Clearly state the main focus of the image.
- **Upload Reference Images:** Use MidJourney's "image reference" option to upload brand assets.
- **Write Detailed Prompts:** Include specifics about tone, personality, visual elements, and style preferences.
- **Add Style and Mood Details:** Specify elements like "minimalist," "vintage," "dramatic," or "cheerful."
- **Incorporate Color and Composition:** Describe color palettes and key elements to include or exclude.
- **Iterate and Refine:** Generate variations and refine your prompt to align with your creative needs.
- **Use the "Moodboard" Feature:** Group reference images for a cohesive brand aesthetic.
- **Highlight Specific Areas for Edits:** MidJourney allows you to focus on specific parts of an image for adjustments or refinements, giving you more control over the final design.

Tip: Create multiple images in one session that align with your brand and aesthetic, then save them in a shared folder for your team to access and use as needed. Batch creating in this way saves time and ensures you have ready-to-use images whenever they're needed.

AI Workflows for Small Businesses

Driving Better Results with AI-Powered Google Ads

Purpose: This workflow provides a step-by-step guide for using large language models (LLMs) and AI image generators to create, optimize, and enhance a Google Ads campaign for a small business. By following these steps, you can maximize your ad budget, attract high-quality leads, and improve conversion rates without needing extensive marketing expertise.

Step 1: Define Your Goals & Audience

Tools Used

LLMs (for campaign planning and audience insights)

Set Your Campaign Objective

- Generating leads (e.g., form submissions, consultation requests)
- Increasing website traffic
- Boosting brand awareness

Outcome

Clearly defined campaign goals and audience segments ensure that ads reach the right people.

Identify Your Target Audience

Use an LLM to generate audience personas by analyzing customer data and business objectives.

Example prompt:

> Describe the ideal customer profile for a commercial landscaping business that focuses on sustainability and cost efficiency. Include industry, job roles, and key concerns.
>
> + Reason

Step 2: Generate AI-Powered Keyword Lists

Tools Used

LLMs (for keyword research and ad group structuring)

Outcome

AI-generated keyword lists help businesses target the right searches while maintaining efficiency in ad spend.

Generate Relevant Keywords with an LLM

Example prompt:

> Generate 20 high-intent keywords for a Google Ads campaign for a commercial landscaping company. Include variations for cost savings and eco-friendly solutions.
>
> + Reason

Step 3: Write AI-Optimized Ad Copy

Tools Used

LLMs (for ad copy)

Outcome

LLM-generated ad copy ensures compelling messaging while allowing Google AI (if used) to optimize ad performance automatically.

Generate Multiple Ad Variations

Example prompt:

> Write five variations of a Google Ad for a commercial lawn care company. Each should highlight a different selling point: affordability, sustainability, reliability, expert service, and water conservation.
>
> + Reason

Step 4: Create High-Impact Ad Visuals

Tools Used

AI Image Generators (for ad creatives)

Outcome

AI-generated visuals ensure ad creatives align with messaging and attract more engagement.

Generate Relevant Ad Images

Example prompt:

> Create a photorealistic digital ad image of a lush, well-manicured commercial lawn with a professional landscaping team in action. Include bright, vibrant colors and a clear focal point.
>
> + Reason

Step 5: Monitor & Optimize with AI Insights

Tools Used

LLMs (for data analysis and improvement recommendations)

Outcome

AI provides real-time data analysis, helping businesses make faster, smarter optimizations.

Refine Ad Copy & Keywords

Example prompt:

> Analyze this Google Ads performance data and suggest improvements: [paste key metrics].
>
> + Reason

Final Outcome: AI-Driven Google Ads Success

- ✓ High-converting ad copy generated quickly and at scale
- ✓ AI-optimized visuals that align with ad messaging
- ✓ Data-backed improvements using AI-driven analysis

Creating Smarter Content Strategies with AI

Purpose: This workflow helps businesses create a structured content strategy using LLMs for research, writing, and optimization, and image generators for visual content.

Step 1: Identify Target Audience & Goals

Tools Used

LLMs (for audience research and content planning)

Outcome

AI-generated insights ensure content is aligned with audience needs.

Define Buyer Personas

Example prompt:

> Describe the ideal audience for a cybersecurity consulting firm. Include pain points, demographics, and preferred content types.



Step 2: Conduct AI-Powered Topic Research

Tools Used

LLMs (for topic generation and competitor analysis)

Outcome

AI-driven research ensures content is engaging and strategically aligned.

Generate & Prioritize Topics

Example prompt:

> Suggest ten blog post topics for a small business cybersecurity firm that wants to educate and convert leads.



Step 3: Generate Written Content

Tools Used

LLMs (for content writing)

Outcome

AI-generated content speeds up production while maintaining consistency.

Create Blog Posts, Case Studies, and Whitepapers

Example prompt:

> Write a 1,000-word blog post on 'How Small Businesses Can Prevent Cybersecurity Breaches.' Include an introduction, key strategies, and a call to action.



Step 4: Generate Visual Content with AI

Tools Used

AI Image Generators (for social media and blog visuals)

Outcome

AI-generated visuals enhance engagement and improve brand consistency.

Create Custom Visuals

Example prompt:

> Generate an engaging infographic showing the top five cybersecurity threats for small businesses. Use a modern, clean design with icons and a professional color scheme.



Step 5: Optimize and Analyze Performance

Tools Used

LLMs (for content analysis and recommendations)

Outcome

AI insights ensure ongoing content improvement and strategic refinement.

Analyze Performance & Adjust Strategy

Example prompt:

> Analyze this blog post's engagement metrics and suggest ways to improve SEO and reader retention.



Achieving Content Marketing Success with AI

- ✓ AI-generated content and visuals streamline production
- ✓ Improved audience targeting and engagement
- ✓ Faster optimization through AI analysis

Boosting Engagement with AI-Powered Email Campaigns

Purpose: This workflow outlines how to use LLMs to generate and personalize email marketing campaigns, with AI-generated visuals to enhance engagement.

Step 1: Define Campaign Goals & Audience Segments

Tools Used

LLMs (for campaign planning and audience segmentation)

Set Campaign Objectives

- Drive product sales
- Nurture leads
- Increase customer retention

Outcome

Personalized segmentation increases engagement and reduces unsubscribes.

Segment Email List with AI

Example prompt:

> Segment my email subscribers based on purchase history, engagement level, and interests to create three targeted email lists.
>
> + Reason

Step 2: Generate AI-Powered Email Content

Tools Used

LLMs (for email copywriting)

Outcome

AI-driven email copy improves open and conversion rates.

Use AI for Subject Lines & Personalization

Example prompt:

> Write three subject lines for an email promoting a limited-time 20% discount for loyal customers. Make one friendly, one urgent, and one curiosity-driven.
>
> + Reason

Step 3: Generate AI-Enhanced Email Visuals

Tools Used

AI Image Generators (for header images and promotional banners)

Outcome

AI-generated visuals enhance the appeal and professionalism of email campaigns.

Create Email Graphics

Example prompt:

> Design a sleek promotional banner for a '20% Off Flash Sale' email campaign. Use vibrant colors, a clear CTA, and a modern design.
>
> + Reason

Step 4: Automate Email Sequences & Optimize Performance

Tools Used

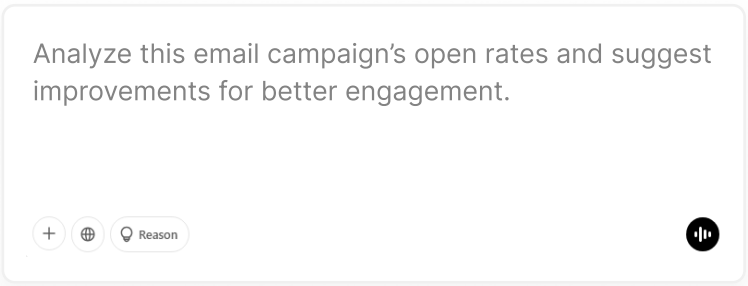
LLMs (for copywriting improvements and performance analysis)

Outcome

AI helps refine email strategy for higher engagement and conversions.

Optimize Send Times & Content

Example prompt:



Unlocking High-Performing Email Campaigns with AI

- AI-generated email content and visuals ensure a professional and engaging campaign
- AI-powered segmentation improves personalization and customer response
- AI-driven analysis continuously refines email marketing strategy

Simplifying Financial Reporting & Documentation With AI

Purpose: This workflow outlines how small businesses can use large language models (LLMs) and AI-generated visuals to automate financial reporting, improve accuracy, and enhance documentation. By leveraging AI, businesses can save time, reduce errors, and generate professional-quality financial summaries.

Step 1: Gather and Organize Financial Data

Tools Used

LLMs (for data structuring and report formatting)

Set Campaign Objectives

- Income statements
- Balance sheets
- Cash flow reports
- Expense records

Outcome

AI quickly organizes raw financial data, preparing it for reporting and analysis.

Organize Data for AI Processing

Example prompt:

> Format the following financial transactions into a structured table, categorized by revenue, expenses, and net profit: [paste raw data].



Step 2: Generate Financial Summaries with AI

Tools Used

LLMs (for financial report summarization)

Outcome

AI generates clear, structured financial summaries, making reports more accessible and insightful.

Create Executive Summaries

Example prompt:

> Summarize this profit and loss statement for Q4 2024, highlighting key trends, revenue growth, and major expenses.



Step 3: Automate Report Formatting & Compliance Documentation

Tools Used

LMs (for report structuring)

Outcome

AI ensures financial reports are professionally structured and adhere to compliance standards.

Generate Standardized Report Formats

Example prompt:

> Format this financial data into a professional annual report structure, including revenue trends, expense breakdowns, and net profit margins.



Ensure Compliance with Financial Regulations

Example prompt:

> Check this financial report for compliance with GAAP standards and suggest any necessary revisions.



Step 4: Enhance Reports with AI-Generated Financial Visuals

Tools Used

AI Image Generators (for data visualization and professional report graphics)

Outcome

AI-generated visuals enhance financial reports, making them more engaging and easier to interpret.

Create Visual Financial Insights

Example prompt:

> Generate an infographic summarizing key financial performance indicators, including revenue growth, expenses, and profit margins.



Generate Professional Cover Pages for Financial Reports

Example prompt:

> Design a clean, corporate-style cover page for an annual financial report. Include the business name, report title, and a minimalist financial-themed background.



Step 5: Review and Refine Reports for Accuracy

Tools Used

LLMs (for proofreading and quality control)

Outcome

AI ensures reports are error-free, professionally structured, and easy to understand.

Identify Errors and Inconsistencies

Example prompt:

> Analyze this financial report and identify any inconsistencies, missing data, or formatting errors.
>
> + Reason

Refine Reports for Readability

Example prompt:

> Simplify the language in this financial report without losing key financial insights.
>
> + Reason

Powering Accurate, Efficient Reporting with AI

- ✓ **Faster Reporting:** AI automates financial data organization and report generation
- ✓ **Improved Accuracy:** AI detects errors and ensures compliance with financial standards
- ✓ **Enhanced Presentation:** AI-generated visuals make financial reports more professional and easy to understand
- ✓ **Time Savings:** AI streamlines document formatting and content summarization

Improving Receivables and Payment Tracking with AI

Purpose: This workflow outlines how small business accounting firms can use large language models (LLMs) to automate invoice reminders, generate payment follow-up emails, and create financial summary reports for overdue accounts. By leveraging AI, firms can improve cash flow, reduce late payments, and maintain professional client communications with minimal manual effort.

Step 1: Organize Outstanding Invoices

Tools Used

LLMs (for invoice categorization and follow-up prioritization)

Set Campaign Objectives

- Overdue (1–15 days past due)
- Late (15–45 days past due)
- Critical (45+ days past due)

Outcome

AI-generated invoice summaries help accountants prioritize follow-ups efficiently.

Generate a Summary of Outstanding Invoices

Example prompt:

> Summarize the following outstanding invoices by client, amount, due date, and aging category. Identify clients with the highest overdue balances.
>
> + Reason

Step 2: Draft AI-Powered Payment Reminder Emails

Tools Used

LLMs (for personalized email generation)

Outcome

LLMs create customized, effective reminders that maintain positive client relationships while increasing payment rates.

Generate Polite First Payment Reminders

Example prompt:

> Write a professional but friendly payment reminder email for an invoice that is 7 days overdue. Include a gentle request for payment and a direct link to pay.
>
> + Reason

Escalate Late Payment Reminders

Example prompt:

> Write a more urgent follow-up email for a client whose invoice is 30 days overdue. Maintain professionalism but emphasize the importance of immediate payment.
>
> + Reason

Step 3: Automate Final Payment Demands for Critical Accounts

Tools Used

LLMs (for firm but professional escalation emails)

Outcome

AI-generated communication ensures consistency and professionalism while addressing overdue accounts.

Generate Stronger Payment Request Emails

Example prompt:

> Write a firm but professional final payment request email for a client with a 60-day overdue invoice. Include a warning about potential late fees or account suspension.
>
> 
>

Create a Follow-Up Phone Call Script

Example prompt:

> Draft a professional but firm phone script for an accountant calling a client regarding an overdue payment of $5,000 that is 60+ days past due.
>
> 
>

Step 4: Provide Client-Friendly Financial Summaries

Tools Used

LLMs (for report generation)
AI Image Generators (for visual summaries)

Outcome

AI-generated reports and visuals help clients quickly understand their financial standing, encouraging faster payments.

Generate Past-Due Reports for Clients

Example prompt:

> Summarize a client's overdue invoices, total balance, and outstanding days in a clear, easy-to-read report format.
>
> 
>

Create a Visual Payment History Overview

Example prompt:

> Generate an infographic-style visual showing a client's payment history, highlighting late payments and overdue balances.
>
> 
>

Step 5: Analyze & Optimize Payment Collection Strategy

Tools Used

LLMs (for payment trend analysis)

Outcome

AI-driven analysis helps businesses refine their payment collection strategy for improved cash flow.

Identify Payment Trends & Issues

Example prompt:

> Analyze payment history data to identify patterns in late payments. Suggest process improvements to reduce overdue invoices.
>
> + Reason

Optimizing Accounts Receivable with AI

- **Faster Collections:** AI automates invoice reminders and escalations
- **Improved Cash Flow:** AI helps reduce overdue accounts with timely follow-ups
- **Professional Client Communication:** AI-generated emails maintain business relationships
- **Data-Backed Insights:** AI-driven reporting enhances payment tracking and forecasting

Seamless Client Transitions and Data Migration Using AI

Purpose: This workflow outlines how accounting firms can use large language models (LLMs) to streamline client onboarding, structure financial history, and automate data migration. By leveraging AI, firms can reduce manual data entry, enhance accuracy, and ensure a smooth transition to new accounting systems.

Step 1: Collect & Organize Client Information

Tools Used

LLMs (for structured data intake)

Outcome

AI-generated intake forms and structured data summaries reduce onboarding time.

Generate Custom Client Intake Forms

Example prompt:

> Create a client intake questionnaire for a small business onboarding to our accounting services. Include sections for financial history, revenue, expenses, and tax filings.



Extract Key Client Details from Documents

Example prompt:

> Summarize key financial data from this client's balance sheet and tax returns, including revenue trends and expense categories.



Step 2: Automate Data Migration & Formatting

Tools Used

LLMs (for data structuring)

Outcome

LLMs ensure smooth data transfer while minimizing errors

Convert Financial Data into a New Accounting Format

Example prompt:

> Reformat this financial data from QuickBooks into a structured format compatible with Xero accounting software.



Identify Inconsistencies & Missing Data

Example prompt:

> Analyze this set of financial records and identify missing transactions or inconsistencies.



Step 3: Generate Client Financial History Summaries

Tools Used

LLMs (for report generation)
AI Image Generators (for visual financial overviews)

Outcome

AI-generated reports provide clients with a clear, easy-to-understand financial overview.

Create a Summary of a Client's Financial Performance

Example prompt:

> Summarize this client's last two years of financial performance, highlighting revenue growth, expense trends, and tax liabilities.

Generate Visual Financial Overviews

Example prompt:

> Create an infographic summarizing a new client's revenue and expenses over the past year. Use a clean, professional design.

Step 4: Automate Onboarding Documentation & Agreements

Tools Used

LLMs (for contract and agreement generation)

Outcome

LLMs automate documentation, reducing manual effort and ensuring legal clarity.

Draft Service Agreements & Engagement Letters

Example prompt:

> Write a client service agreement outlining our accounting services, payment terms, and confidentiality clauses.

Generate Welcome Emails & Next Steps

Example prompt:

> Write a professional welcome email for a new client, including an overview of our accounting process, key contacts, and next steps.

Step 5: Monitor & Optimize the Onboarding Process

Tools Used

LLMs (for workflow analysis and improvement suggestions)

Outcome

AI-driven insights optimize onboarding workflows for future clients.

Analyze Client Onboarding Data for Process Improvements

Example prompt:

> Analyze past client onboarding data and identify common bottlenecks or delays. Suggest ways to improve efficiency.

Achieving Seamless Client Onboarding with AI

- **Faster Onboarding:** AI automates data intake and processing
- **Seamless Data Migration:** LLMs ensure smooth and accurate transitions
- **Professional Documentation:** AI-generated agreements and welcome emails streamline client engagement
- **Improved Client Understanding:** AI-generated financial reports help clients grasp their financial status quickly

Building Client-Facing IT Dashboards with AI

Purpose: This workflow outlines how IT Managed Service Providers (MSPs) can use large language models (LLMs) and AI-generated visuals to automate client-facing IT service reports. AI can help summarize ticket resolution times, system uptime, security updates, and service trends in a professional and visually engaging manner.

Step 1: Collect and Organize IT Service Data

Tools Used

LLMs (for data summarization)
AI Image Generators (for visual dashboards)

Outcome

AI compiles IT performance data into a structured format, making report generation easier.

Gather Key IT Metrics for Reporting

- Number of support tickets opened and resolved
- Average resolution time per issue category
- System uptime and downtime trends
- Security patching status and updates applied
- Notable IT security threats and mitigation efforts

Step 2: Generate Executive Summaries Using LLMs

Tools Used

LLMs (for report writing and executive summaries)

Summarize IT Performance for Clients

Example prompt:

> Summarize IT service performance for [client name] over the last month. Include key metrics, resolved issues, and improvements in system uptime.
>
> + Reason

Outcome

AI transforms complex IT data into digestible insights for clients, improving communication and transparency.

Generate Clear, Business-Friendly Language

Example prompt:

> Rewrite this technical IT service report in simple language for non-technical business owners, keeping it under 300 words.
>
> + Reason

Step 3: Visualize IT Performance with AI-Generated Dashboards

Tools Used

AI Image Generators (for charts and infographics)

Outcome

AI-generated visuals enhance report readability, allowing clients to quickly grasp IT performance trends.

Create a Visual Overview of IT Service Metrics

Example prompt:

> Generate an infographic summarizing system uptime, ticket resolution rates, and security patching trends over the past quarter.



Generate Custom Graphs for Client Reports

Example prompt:

> Create a bar chart showing monthly ticket volume and resolution times for [client name] over the past 6 months.



Step 4: Automate Report Formatting & Delivery

Tools Used

LLMs (for report structuring)

Outcome

AI-generated reports and emails ensure consistency and professionalism in client communications.

Format IT Service Reports for Professional Presentation

Example prompt:

> Format this IT service report into a structured document, including an introduction, key metrics, security updates, and recommendations.



Automate Report Email Generation

Example prompt:

> Write a professional email to [client name] summarizing their IT service performance report and highlighting key takeaways.



Delivering Clearer IT Insights with AI

- **Faster Reporting:** AI compiles and summarizes IT performance data automatically
- **Improved Client Communication:** AI-written reports simplify complex technical details
- **Professional Presentation:** AI-generated visuals make reports more engaging
- **Time Savings:** AI automates repetitive reporting tasks, freeing up IT teams for strategic work

Improving Cybersecurity Training with AI Tools

Purpose: This workflow details how MSPs can use LLMs and AI image generators to create engaging IT security awareness training. AI can generate phishing awareness emails, quizzes, and realistic simulations to improve cybersecurity education.

Step 1: Generate IT Security Training Content

Tools Used

LLMs (for training script and email generation)
AI Image Generators (for phishing email simulations)

Outcome

AI generates realistic phishing emails and structured training content for better employee security awareness.

Create Custom Cybersecurity Training Modules

Example prompt:

> Write an IT security awareness training guide for employees, covering phishing, password security, and malware prevention.
>
> + Reason

Generate Engaging Phishing Awareness Emails

Example prompt:

> Write a phishing simulation email for internal cybersecurity training. Make it appear as a fake invoice from a well-known vendor.
>
> + Reason

Step 2: Develop AI-Powered Security Awareness Quizzes

Tools Used

LLMs (for quiz generation)

Outcome

AI-generated quizzes help assess and improve employee security awareness.

Create Interactive Cybersecurity Quizzes

Example prompt:

> Generate a 10-question multiple-choice quiz to test employees on phishing detection and safe email practices.
>
> + Reason

Generate Explanations for Each Quiz Answer

Example prompt:

> "Provide brief explanations for the correct answers in this cybersecurity quiz to reinforce learning.
>
> + Reason

Step 3: Track Training Engagement & Performance

Tools Used

LLMs (for reporting on training completion)
AI Image Generators (for visual progress reports)

Outcome

AI-generated tracking ensures security training effectiveness and compliance monitoring.

Generate Training Completion Reports

Example prompt:

> Summarize employee participation and quiz results for the cybersecurity training program. Highlight knowledge gaps.
>
> + Reason

Create Visual Reports of Security Training Progress

Example prompt:

> Generate a progress chart showing the percentage of employees who completed security training and their quiz scores.
>
> + Reason

AI-Driven Cybersecurity Training Success

- ✓ **Better Security Awareness:** AI-generated phishing simulations improve real-world threat detection
- ✓ **Higher Engagement:** AI-powered quizzes and interactive content enhance learning
- ✓ **Measurable Results:** AI tracks training completion and identifies areas for improvement
- ✓ **Time Savings:** Automating security training reduces manual effort for IT teams

Automating Cyber Incident Response with AI

Purpose: This workflow explains how MSPs can use LLMs and AI-generated visuals to automate cybersecurity incident response. AI can assist in drafting structured security incident reports, illustrating breach paths, and generating response playbooks.

Step 1: Identify and Document Security Incidents

Tools Used

LLMs (for incident report generation)

Outcome

AI-generated reports ensure rapid and consistent incident documentation.

Draft an Initial Cybersecurity Incident Report

Example prompt:

> Write a structured security incident report detailing an attempted phishing attack on [date]. Include the attack vector, affected systems, and initial response steps.
>
> + Reason

Summarize Incident Details for Leadership Review

Example prompt:

> Summarize this security breach in non-technical language for executive leadership, keeping it under 200 words.
>
> + Reason

Step 2: Analyze Attack Paths & Generate Visual Representations

Tools Used

AI Image Generators (for breach path visualization)

Outcome

AI-generated visuals help IT teams quickly understand attack vectors and improve defenses.

Create a Security Breach Diagram

Example prompt:

> Generate a flowchart showing how a phishing email led to unauthorized access in a company's email system.
>
> + Reason

Visualize Network Vulnerabilities

Example prompt:

> Create an infographic displaying weak points in a company's firewall that were exploited during a cyber attack.
>
> + Reason

Step 3: Automate Incident Response Playbooks

Tools Used

LLMs (for response procedures)

Outcome

AI-generated playbooks standardize incident response, reducing recovery times.

Generate Step-by-Step Incident Response Actions

Example prompt:

> Write a response playbook for handling ransomware attacks, including containment, eradication, and recovery steps.
>
> + Reason

Automate Employee Communications for Security Incidents

Example prompt:

> Write an internal security alert email for employees about a recent phishing attack. Include steps to verify email security.
>
> + Reason

Optimizing Incident Detection and Response with AI

- **Faster Incident Documentation:** AI generates structured security reports instantly
- **Clearer Attack Visualizations:** AI-generated graphics simplify breach analysis
- **Standardized Response Protocols:** AI automates playbook creation for quicker recovery
- **Better Employee Awareness:** AI helps inform staff about security threats efficiently

Using AI Prompts to Simplify Marketing and Business Tasks

Using well-crafted prompts and refinement techniques ensures that AI tools deliver highly effective and brand-aligned marketing content. Whether generating text-based content or visuals, structuring prompts effectively enhances the quality of AI outputs.

Social Media Content

Tips for Effective Social Media Prompts:

Use Specific Call-to-Actions (CTAs)

Drive engagement by including clear CTAs, like "Tag a friend" or "Shop now."

Reference Platform-Specific Features

Tailor posts to include features like polls (Instagram Stories) or trending hashtags (Twitter/X).

Leverage Brand Voice

Ensure all content aligns with your tone—whether fun, professional, or conversational.

Giveaway Announcement

Prompt

> Write a [tone] social media post for [platform] announcing a giveaway. The goal is to encourage participation and engagement. Highlight the prize, how to enter, and the deadline. Include [number] hashtags and a clear CTA.

New Product Launch

Prompt

> Create a [tone] post for [platform] announcing the launch of [product]. Highlight its unique features, who it's for, and how it solves a problem. Include [number] hashtags and a CTA like 'Shop now' or 'Learn more.' Keep it under [character limit].

Event Promotion

Prompt

> Write a [tone] social media post for [platform] promoting [event]. Highlight the event's purpose, date, and how to attend. Include urgency and a CTA like 'Register now' or 'Save your spot.

Educational Post for LinkedIn

Prompt

> Write a professional LinkedIn post about [topic]. The goal is to educate and showcase expertise. Include insights, actionable takeaways, and a CTA encouraging discussion or connecting.

Inspirational Quote Post

Prompt

Write a [tone] post for [platform] featuring an inspirational quote related to [topic]. Tie it back to the brand or product and include a CTA like 'Share your thoughts' or 'Tag someone who needs this.

Email Marketing

Tips for AI-Generated Email Campaigns:

Use Personalization

Dynamic tags like "[First Name]" make emails feel personalized.

Segment for Relevance

Target specific customer groups based on behaviors, preferences, or demographics.

Focus on Clear CTAs

Ensure every email has one primary, simple, and compelling call to action.

Promotional Email

Prompt

Write a [tone] promotional email targeting [specific audience]. The goal is to [e.g., promote a sale, highlight a new product, or drive website traffic]. Include a subject line, a concise email body, and a CTA to [specific action, e.g., shop now, learn more].

Event Invitation Email

Prompt

Create a [tone] email inviting [target audience] to [event type, e.g., webinar, in-person event]. Include a catchy subject line, event overview, key benefits, and a CTA to register.

Product Launch Announcement

Prompt

Write an email announcing the launch of [new product]. The tone should be [tone, e.g., exciting, professional]. Highlight the product's key features and benefits, who it's for, and why it's worth checking out. Include a compelling subject line and CTA.

Re-engagement Email

Prompt

Write a [tone] re-engagement email aimed at [specific audience, e.g., dormant customers, inactive subscribers]. The goal is to remind them of your brand's value and encourage them to take action (e.g., shop again, check out new products). Include a subject line, a brief message, and a CTA.

Welcome Email

Prompt

Write a [tone] welcome email for new subscribers. The goal is to introduce them to your brand, highlight key benefits of joining, and include a CTA to encourage them to take the next step (e.g., shop, explore the website, follow on social media).

Website Copy

Tips for AI-Generated Web Copy:

Incorporate Keywords

Use SEO-friendly keywords naturally.

Match User Intent

Craft content that answers questions or solves problems.

Ensure Readability

Keep sentences concise and scannable with bullet points and headings.

Hero Headline for a Landing Page

Prompt

Write a persuasive, benefit-focused hero headline for a [type of webpage, e.g., product page, service page]. The tone should match our brand's [tone, e.g., professional, friendly]. Highlight [specific benefits, e.g., time-saving, cost-efficiency].

Product Descriptions

Prompt

Write a detailed product description for [product name]. Highlight key features like [specific features] and include benefits that solve customer pain points. Use persuasive language and include SEO keywords from [list].

Advertising Copy

Ad Copy for Digital Ads

Write three ad variations for [platform, e.g., Google, Facebook] promoting [product]. Highlight key benefits, use persuasive language, and include a CTA.

Audience Targeting Strategy

Suggest audience segmentation ideas for [product/service] targeted at [demographic].

Accounting AI Prompts

Using AI for accounting is a bit different from content generation—your prompts should be simple, direct, and based on numbers. Always ensure accuracy by double-checking AI-generated figures, verifying calculations, and using trusted tools, especially when getting started.

AI tools can assist with various accounting functions, from generating financial summaries to forecasting cash flow. Here are some structured prompts to help automate and refine basic accounting tasks.

Financial Reports & Summaries

Profit & Loss Report Summary

Prompt

Summarize the profit and loss statement for [time period, e.g., last quarter] using data from [source]. Highlight total revenue, major expenses, net profit/loss, and key insights in a concise format.

Example Output

For Q4 2024, total revenue was $250,000, with operating expenses of $150,000. The net profit was $100,000, a 15% increase from Q3. Key insights: A 10% growth in online sales contributed significantly, while marketing expenses increased by 5%.

Balance Sheet Summary

Prompt

Provide a summary of the balance sheet as of [date]. Highlight assets, liabilities, and equity, and explain any significant changes compared to the previous period.

Example Output

As of December 31, 2024, total assets were $1.2M, liabilities stood at $500K, and equity was $700K. Notable changes: Accounts receivable increased by 20%, indicating higher customer purchases but slower payments.

Cash Flow Analysis

Prompt

Analyze the cash flow statement for [time period]. Identify key cash inflows and outflows, trends in operating, investing, and financing activities, and potential areas for improvement."

Example Output

Operating cash flow was positive at $75K due to increased sales, but high inventory purchases ($40K) impacted liquidity. To improve, consider optimizing inventory management and negotiating better payment terms with suppliers.

Budgeting & Forecasting

Prompt

Analyze the business expenses for the past [time period]. Identify categories with the highest spending, trends in cost increases, and areas where spending could be reduced.

Example Output

Over the past six months, marketing expenses rose by 18%, primarily due to increased ad spend. Office expenses remained stable, but utility costs increased by 5%. Consider reallocating marketing budgets to higher-performing channels.

Revenue Forecasting

Prompt

Based on past revenue trends from [time period], predict the expected revenue for [next time period]. Identify potential risks and opportunities that could impact this forecast.

Example Output

Projected revenue for Q2 2025 is estimated at $275,000, assuming a 10% growth trend continues. Risks include potential supply chain disruptions, while new product launches could drive additional revenue growth.

Bookkeeping & Transaction Management

Categorizing Transactions

Prompt

Categorize the following business transactions into appropriate accounting categories (e.g., revenue, operating expense, capital expenditure). If unclear, suggest possible categorizations.

Example Input

Purchase of new office furniture for $5,000, payment received for consulting services, software subscription fee, employee payroll.

Example Output

Furniture purchase → Capital Expenditure
Consulting payment → Revenue
Software subscription → Operating Expense
Payroll → Salaries & Wages Expense

Detecting Duplicate Transactions

Prompt

Analyze the transaction records for [time period] and identify any duplicate entries or inconsistencies. Highlight potential duplicate transactions for further review.

Example Output

Identified two duplicate transactions: 'Office Supplies - $250' recorded twice on Jan 15. Review and adjust to avoid errors in financial reporting.

Reconciling Bank Statements

Prompt

Compare the bank statement data with recorded transactions in the accounting ledger for [time period]. Identify any discrepancies, missing entries, or potential errors.

Example Output

Found three discrepancies: a $500 payment to Vendor A missing in the ledger, a duplicate entry for a $200 transaction, and a $75 bank fee unrecorded. Recommend adjusting records accordingly.

Tax Preparation & Compliance

Sales Tax Calculation

Prompt

Calculate the total sales tax collected for [time period] based on recorded sales transactions. Provide a breakdown by tax rate if applicable.

Example Output

Total sales tax collected for January 2025: $5,250. Breakdown: State tax (5%): $3,000, Local tax (2%): $1,250, Federal tax (1%): $1,000.

Tax Deduction Analysis

Prompt

Analyze business expenses for [year] and identify potential tax-deductible expenses. Categorize expenses into deductible and non-deductible categories based on IRS guidelines.

Example Output

Tax-Deductible Expenses
Office rent, software subscriptions, employee salaries, travel expenses for business meetings.

Non-Deductible Expenses
Personal meals, fines/penalties, entertainment expenses not related to business.

Estimated Quarterly Tax Payments

Prompt

Estimate the required quarterly tax payment for a small business earning [$X] in taxable income. Assume a tax rate of [Y%] and include any applicable deductions.

Example Output

For Q1 2025, with an estimated taxable income of $100,000 and a tax rate of 25%, the business should set aside approximately $25,000 for tax payments. Adjustments may be needed based on final deductions.

Fraud Detection & Financial Anomalies

Identifying Unusual Transactions

Prompt

Review transaction history for [time period] and identify any transactions that appear unusual based on historical spending patterns.

Example Output

Detected an unusually high charge of $10,000 to an unknown vendor on March 5, significantly higher than typical expenses. Recommend reviewing for potential fraud or misclassification.

Cash Flow Risk Assessment

Prompt

Analyze the cash flow statement and identify any potential liquidity risks based on current inflows and outflows.

Example Output

Risk identified: High accounts receivable ($50,000 overdue by 60+ days) may impact cash flow. Consider follow-ups or adjusting credit policies.

IT AI Prompts

AI tools can assist with various IT functions, from troubleshooting common issues to automating security and network management tasks. Here are structured prompts to help streamline basic IT operations. Since IT-related prompts often require precise technical input, keep them simple, specific, and factual. Always verify AI-generated recommendations before implementation, especially for security-related tasks.



IT Troubleshooting & Support

AI can help diagnose and resolve common IT issues, reducing downtime and improving efficiency.

Diagnosing a Slow Computer

Prompt

List possible reasons why a computer running [operating system] is slow and provide troubleshooting steps to resolve the issue.

Example Output

1. **Too many startup programs** → Disable unnecessary startup apps.
2. **Low disk space** → Free up space by deleting unused files or moving data to cloud storage.
3. **Outdated software/drivers** → Check for and install pending updates.
4. **Malware or background processes** → Run a full antivirus scan.

Fixing Internet Connection Issues

Prompt

Provide a step-by-step troubleshooting guide for fixing a slow or unstable internet connection in an office network."

Example Output

1. Restart the router and modem.
2. Run a speed test to check the connection.
3. Ensure no bandwidth-heavy applications are running in the background.
4. Switch to a wired connection for stability.
5. Check for firmware updates on network hardware.

Troubleshooting Printer Issues

Prompt

Generate a troubleshooting checklist for a printer that is not responding to print commands.

Example Output

1. Verify the printer is turned on and connected to the network.
2. Restart the printer and computer.
3. Check for and update printer drivers.
4. Clear any print jobs stuck in the queue.
5. Ensure there are no paper jams or low ink warnings.

IT Security & Cybersecurity

AI can assist in monitoring security risks, strengthening cybersecurity policies, and detecting vulnerabilities.

Basic Cybersecurity Best Practices for Employees

Prompt

Generate a simple list of cybersecurity best practices for employees to follow in an office environment.

Example Output

1. Use strong, unique passwords for all accounts.
2. Enable multi-factor authentication (MFA) whenever possible.
3. Avoid clicking on suspicious email links or attachments.
4. Lock your computer when stepping away from your desk.
5. Regularly update software and security patches.

Detecting Phishing Emails

Prompt

List common signs of phishing emails and how to identify them.

Example Output

1. Unexpected emails requesting sensitive information.
2. Misspelled URLs or email addresses.
3. Urgent or threatening language.
4. Unusual attachments or links.
5. Generic greetings like “Dear Customer” instead of a personalized name.

Generating a Secure Password Policy

Prompt

Write a company-wide password policy that promotes strong security without being overly restrictive.

Example Output

- Passwords must be at least 12 characters long.
- Include a mix of uppercase letters, lowercase letters, numbers, and special characters.
- Avoid using easily guessed passwords (e.g., "password123").
- Change passwords every 90 days and do not reuse previous passwords.
- Use a password manager for secure storage.

Network & System Administration

AI can help automate network management tasks and optimize system performance.

Checking for Network Bottlenecks

Prompt

Suggest ways to identify and resolve network bottlenecks in an office environment.

Example Output

1. Run a network speed test and analyze latency.
2. Identify high-bandwidth users and applications.
3. Upgrade network hardware or increase bandwidth allocation.
4. Implement Quality of Service (QoS) rules to prioritize critical traffic.

Monitoring Server Health

Prompt

List key metrics to monitor for maintaining a healthy server and preventing downtime."

Example Output

- CPU and memory usage levels.
- Disk space availability and IOPS performance.
- Network traffic load and latency.
- Uptime percentage and system error logs.
- Patch and update status for installed software.

Automating Software Updates

Prompt

Generate a checklist for setting up an automated software update system for company computers.

Example Output

1. Enable automatic updates for operating systems and critical applications.
2. Schedule updates during off-hours to minimize disruptions.
3. Test major updates in a controlled environment before deployment.
4. Maintain a rollback plan in case of update failures.
5. Use centralized patch management software for better control.

IT Asset Management & Backup Systems

AI tools can help track IT assets, manage software licenses, and ensure data backup compliance.

Tracking IT Equipment

Prompt

Create a simple asset management checklist for tracking office computers and devices.

Example Output

1. Maintain an inventory of all company-owned devices.
2. Assign unique asset tags and track device locations.
3. Log purchase date, warranty status, and software licenses.
4. Perform regular audits to ensure compliance.

Setting Up a Backup Strategy

Prompt

Develop a data backup strategy for a small business, ensuring critical files are protected.

Example Output

- Use the 3-2-1 backup rule (3 copies of data, 2 on different media, 1 offsite).
- Schedule automatic daily backups for essential files.
- Encrypt backups to protect sensitive data.
- Test backups monthly to ensure recoverability.

Restoring Lost Files

Prompt

Provide a step-by-step guide for recovering accidentally deleted files on [operating system].

Example Output

1. Check the Recycle Bin or Trash folder.
2. Use built-in file recovery tools (e.g., Windows File History, macOS Time Machine).
3. Restore from the latest system backup.
4. Use third-party data recovery software if necessary.

IT Help Desk & User Support

AI can assist in drafting responses for common IT support requests, reducing resolution times.

Resetting a Forgotten Password

Prompt

Write a standard email template for users requesting a password reset.

Example Output

Subject:
Password Reset Request Instructions

Body:
"*Dear [User],*
We received a request to reset your password. Click the link below to create a new password: [Reset Link]
If you did not request this, please contact IT support immediately.
Best,

[IT Support Team]"

Onboarding a New Employee (IT Setup Checklist)

Prompt

"List the IT setup steps for onboarding a new employee, including account creation and hardware provisioning.

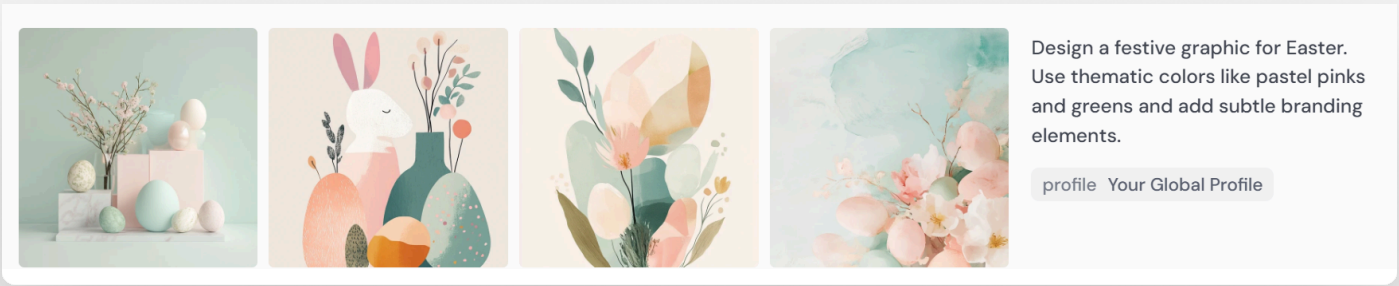
Example Output

1. Create company email and user account.
2. Assign appropriate software licenses and permissions.
3. Configure workstation and install required applications.
4. Provide security training and access credentials.
5. Set up multi-factor authentication (MFA).

AI-Generated Image Prompts

AI-powered image generators can create visuals for marketing, IT, and accounting needs in small businesses. These tools can help generate professional-quality graphics for social media, email headers, website banners, advertising campaigns, and even finance-related reports.

Social Media Graphics



Product Highlight

Prompt

Create a [style, e.g., photorealistic, minimalist] image for Instagram showcasing [product]. Use [color palette] and subtle shadows to make the product pop. Include a clean background.

Seasonal Campaign Graphic

Prompt

Design a festive graphic for [holiday]. Use thematic colors like [colors] and add subtle branding elements.

Customer Testimonial Post

Prompt

Create a clean and professional graphic featuring a customer quote about [product/service]. Use a brand-aligned font and a subtle background that enhances readability.

Behind-the-Scenes Team Post

Prompt

Generate a friendly office environment scene featuring a diverse team collaborating on [task, e.g., brainstorming, customer service, IT support]. Use natural lighting and a modern office setting.

Email Header Images



Design a vibrant email header for a spring sale. Include pastel colors, flowers, and a placeholder for text.

profile Your Global Profile

Seasonal Email Header

Prompt

Design a vibrant email header for a spring sale. Include pastel colors, flowers, and a placeholder for text.

Minimalist Header

Prompt

Design a clean and modern email header for a product launch. Include a single product focus, neutral background, and soft shadows.

Financial Report Summary Header

Prompt

Create a sleek email header for a financial report email. Use professional colors like blue and gray, with subtle graphs or data icons in the background.

Security Alert Email Graphic

Prompt

Generate an alert-style email banner for an IT security update. Use a caution symbol, a professional font, and a neutral but authoritative color scheme.

Finance & IT Business Images



Financial Report Visualization

Prompt

Generate a professional finance-related report cover featuring modern bar graphs, pie charts, and financial analytics on a digital dashboard. Use blue and gray tones with a clean, high-tech design.

Tech Support Advertisement

Prompt

Design an ad image promoting IT support services for small businesses. Show a friendly technician assisting a client, with a futuristic and professional look.

Bookkeeping Services Ad

Prompt

Generate a clean, professional ad image for a small business accounting service. Include a workspace scene with a laptop, financial documents, and a coffee cup, styled in a modern aesthetic.

Cybersecurity Awareness Poster

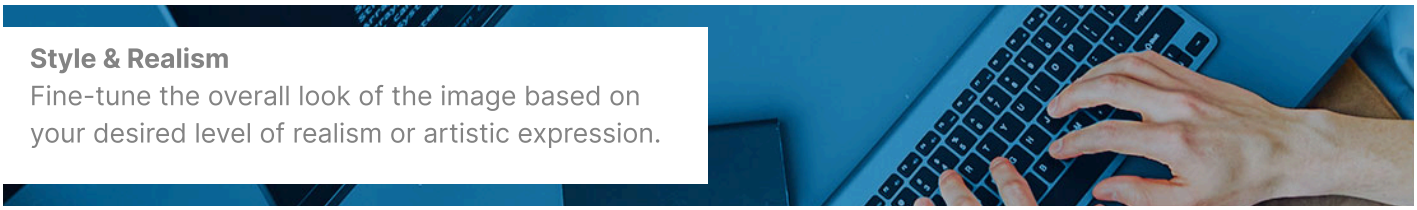
Prompt

Create an IT security awareness graphic featuring a lock, shield, and warning symbols. The design should be modern, with a professional tone, emphasizing safe digital practices.

Refinement Prompts for AI Image Generators

When using AI image generation tools, refining your prompts with specific keywords can significantly impact the quality and style of the final image. By carefully choosing descriptive words, you can adjust realism, artistic style, color schemes, lighting, and composition. Below are some key refinements to enhance your image outputs

Refinement Keywords & Their Effects



Style & Realism
Fine-tune the overall look of the image based on your desired level of realism or artistic expression.

Realistic
Enhances photorealism, making images look more natural and life-like.

Hyper-realistic
Adds extreme detail and clarity, often used for CGI-like or ultra-HD images.

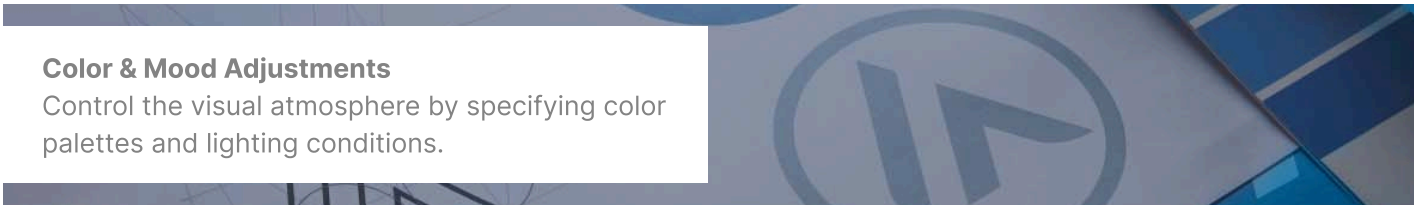
Cinematic
Gives a film-like effect with rich contrast and dramatic lighting.

Painterly
Creates a hand-painted, brushstroke effect, perfect for an artistic or fine art style.

Minimalist
Reduces visual complexity, focusing on clean lines and simple elements.

Futuristic
Incorporates sci-fi elements, sleek design, and high-tech aesthetics.

Surreal
Enhances dreamlike, exaggerated, or abstract features in the composition.



Color & Mood Adjustments
Control the visual atmosphere by specifying color palettes and lighting conditions.

Bright colors
Enhances saturation and vibrancy, making the image more vivid.

Muted tones
Lowers saturation for a softer, understated look.

Neon glow
Adds striking electric colors with glowing highlights.

Pastel palette
Uses soft, gentle colors for a delicate, dreamy feel.

Monochrome
Black and white or single-color scheme for a classic or minimalist effect.

Warm tones
Infuses golden, orange, or red hues to create a cozy atmosphere.

Cool tones
Uses blue, green, and violet hues for a calm, professional, or futuristic vibe.



Lighting & Depth Enhancements

Lighting influences the mood and realism of an AI-generated image.

Soft lighting
Produces gentle illumination, reducing harsh shadows.

Harsh lighting
Increases contrast with strong shadows and highlights.

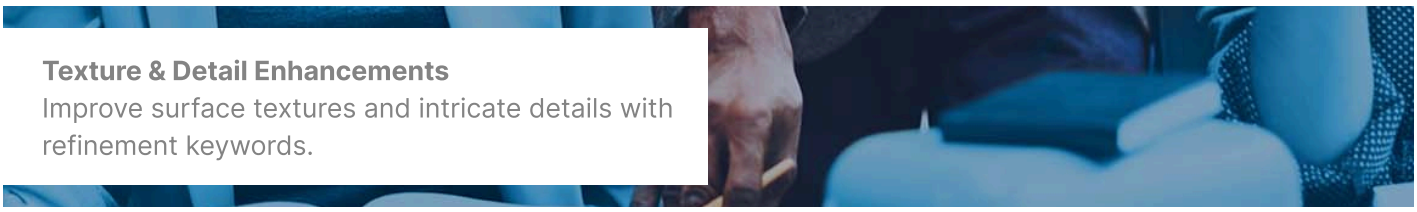
Golden hour lighting
Replicates the warm, diffused glow of sunrise or sunset.

Studio lighting
Mimics professional photography lighting with even exposure.

Dramatic shadows
Adds depth and contrast for a moody effect.

Backlit
Highlights silhouettes and creates glowing outlines.

Volumetric lighting
Enhances realism with natural fog or light beams.



Texture & Detail Enhancements

Improve surface textures and intricate details with refinement keywords.

High detail
Maximizes sharpness, intricate textures, and surface complexity.

Soft focus
Creates a dreamy, blurred background with a sharp subject.

Grainy texture
Adds a vintage or film-style noise effect.

Matte finish
Removes reflections for a flat, smooth appearance.

Glossy shine
Enhances reflections, perfect for glass, metal, and polished surfaces.

Intricate patterns
Adds highly detailed designs or ornamental flourishes.



Composition & Perspective Adjustments

Guide the AI in framing and positioning subjects within the scene.

Wide-angle shot
Expands the field of view, adding depth and perspective.

Close-up
Zooms in on details or expressions.

Dynamic angle
Tilts the perspective for an action-oriented or cinematic look.

Symmetrical composition
Centers the subject in a balanced frame.

Rule of thirds
Positions key elements off-center for a natural composition.

Blurred background
Creates depth by separating the subject from the background.

Example Refinement Prompts in Action

Before

A cityscape at night.

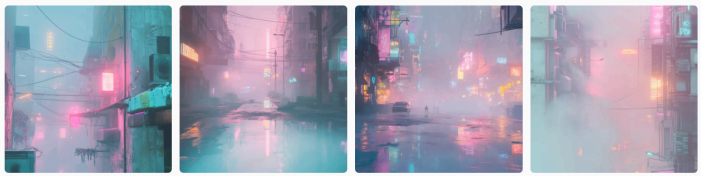


A cityscape at night.

profile Your Global Profile

After

A futuristic cyberpunk cityscape at night, neon glow, cinematic lighting, high detail, foggy atmosphere.



A futuristic cyberpunk cityscape at night, neon glow, cinematic lighting, high detail, foggy atmosphere.

profile Your Global Profile

Before

A cozy living room.



A cozy living room.

profile Your Global Profile

After

A warm and inviting living room with soft lighting, a crackling fireplace, rustic wooden furniture, and a plush couch with textured fabric.

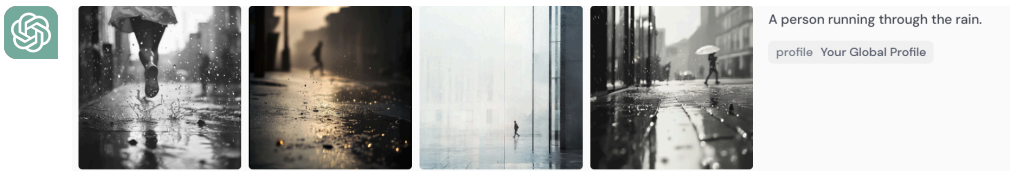


A warm and inviting living room with soft lighting, a crackling fireplace, rustic wooden furniture, and a plush couch with textured fabric.

profile Your Global Profile

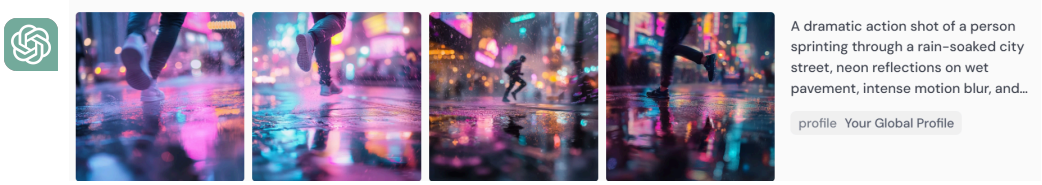
Before

A person running through the rain.



After

A dramatic action shot of a person sprinting through a rain-soaked city street, neon reflections on wet pavement, intense motion blur, and cinematic lighting.



By using these refinement terms, you can help guide AI tools to create more precise, visually striking, and stylistically polished images. It may take a few attempts and different combinations of terms to achieve the desired outcome. Don't be afraid to experiment with various prompts to fine-tune and perfect the result.

TIPS, TROUBLESHOOTING & BEYOND

Other Fun Things AI Can Do

AI tools like ChatGPT offer creative and practical ways to help streamline workflows, boost efficiency, and spark fresh ideas when you need them most.

Here are some fun and practical ways to make the most of them!

Create Tables

ChatGPT can organize information into clear, structured tables. Simply specify the columns you need, such as "Number," "Name," and "Description."

Example prompt:

> Create a table listing the top 5 project management tools, including their name, key features, and pricing.



Summarize Articles

Save time by asking ChatGPT to summarize articles or documents. You can even request specific insights, like key statistics or recommendations.

Example prompt:

> Summarize this article on social media trends and list any statistics mentioned.



Cut Down Research Time

Ask ChatGPT to provide credible resources for your research needs.

Example prompt and Output

> List 5 credible reports on cybersecurity trends in 2025.

- Verizon Data Breach Investigations Report (DBIR)
- IBM Cost of a Data Breach Report



Streamline Content Creation

Quickly Turn Audio Into Content

Transcribe and refine audio content (e.g., webinars or interviews) into written formats. Play the audio while using voice typing in Google Docs for transcription, then refine it with ChatGPT.

Template Creation

Use ChatGPT to create reusable templates for emails, briefs, or social media posts.

Example prompt:

> Create a reusable template for an email inviting customers to a webinar.



Social Listening and Trend Spotting

Ask ChatGPT to analyze social media themes or trends.

Example prompt:

> What are people on social media saying about 'mindful productivity'? Summarize the common themes.



Collaborating with ChatGPT

Ask for Feedback

Treat ChatGPT like a coworker to help refine your work or provide feedback.

Example prompt:

> Does this blog introduction flow well? Suggest ways to make it more engaging.



Brainstorm Ideas

Use ChatGPT to generate creative ideas or expand on existing ones.

Example prompt:

> "Suggest 5 taglines for a sustainable skincare brand.



Plan Workflows

Organize your projects with ChatGPT's help.

Example prompt:

> Create a 4-week social media content plan for a fitness brand.

Reason

Refinement Tips: When AI Gives You Lemons

When the first draft doesn't meet expectations, use these prompts to guide refinement:

For Tone
Rewrite this with a more [specific tone, e.g., upbeat, professional, conversational] style.

For Length
Summarize this into a single sentence while keeping the key message intact.

For Audience
Adjust this to appeal to [specific audience, e.g., busy moms, tech enthusiasts, small business owners]

For Structure
Break this into shorter sentences or bullet points for easier readability.

For Creativity
Make this copy more playful and fun, using metaphors or humor.

Provide More Context:

Beyond just changing tone, suggest adding emotional appeals, urgency, or humor.

Tone Adjustments

> Make this product description more engaging by focusing on how it improves the customer's daily life

Reason

Adding Details: Use ChatGPT to refine specific parts of a text by pointing out areas to adjust

Tone Adjustments

> Expand this paragraph with two additional benefits of using AI for marketing.

Reason

When AI Images Get Weird...

Sometimes, AI-generated images don't turn out quite right—extra fingers, distorted faces, or objects that don't make sense. Here's how to fix them and get the results you want:



- **Be Specific:** Instead of "a hand holding a coffee cup," try "a realistic hand with five fingers holding a ceramic coffee cup, centered in frame."
- **Refine and Retry:** If the image looks off, tweak your prompt. Add details like "symmetrical," "balanced composition," or "proportional anatomy."
- **Use Negative Prompts:** Some AI tools let you specify what to avoid. Try phrases like "no extra fingers" or "avoid distorted faces."
- **Adjust Style and Lighting:** Overly complex or abstract prompts can cause weird results. Simplify your description or specify a consistent style, like "photo-realistic, soft natural lighting."
- **Generate Variations:** If the first result isn't perfect, use variations to refine the details. Request multiple options and pick the best one.
- **Crop and Edit:** Sometimes, an otherwise great image just has one odd element. Use editing tools to fix minor issues instead of starting over.
- **Embrace the Quirks:** Occasionally, AI generates happy accidents that are creative and unique. If something looks cool but unexpected, see if it still fits your vision.

AI image generation isn't always perfect, but with a little patience and fine-tuning, you'll get the results you need. Keep experimenting, refining, and guiding the tool—your perfect image is just a few tweaks away!

Practical Tips for Using AI Tools Effectively



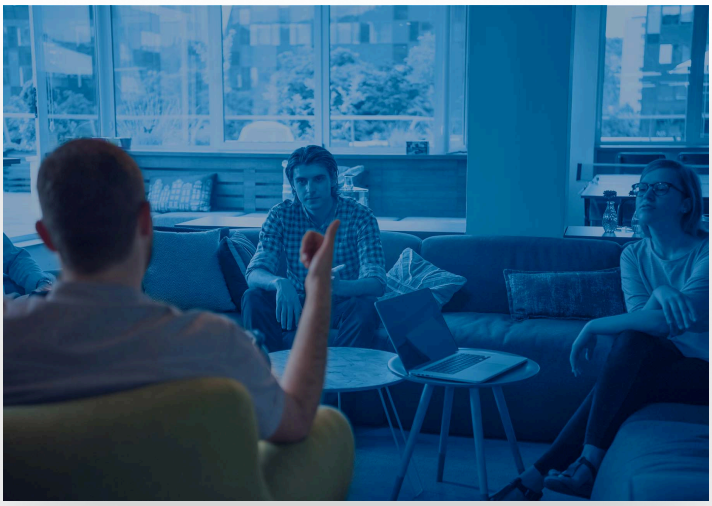
- **Be Clear and Specific:** Whether using an LLM or an AI image generator, detailed prompts lead to better results. Define the style, tone, or composition explicitly
- **Refine and Iterate:** The first output is rarely perfect. Adjust your prompts, add more context, or rephrase instructions for better accuracy.
- **Use Reference Materials:** Upload files or provide examples to help AI tools understand the format, tone, or visual style you're aiming for.
- **Experiment with Variations:** Ask for multiple text versions or image variations to compare results and refine your final choice.
- **Learn AI Quirks:** AI has patterns. Text models might shorten responses, and image generators can struggle with symmetry. Recognizing these tendencies helps you adjust prompts for better outputs.
- **AI is a Tool, Not a Replacement:** AI enhances efficiency but requires human oversight. Always review, refine, and tailor the output to fit your needs.
- **Collaborate and Improve:** Share successful prompts and troubleshooting tips with your team to optimize workflows and maximize AI's potential.

Making the Most of AI: Experiment and Refine

Using AI tools effectively is an ongoing process of refining prompts, testing outputs, and iterating based on results. Whether generating text or visuals, AI works best when guided with clear instructions and adjusted as needed. Play around, tweak your approach, and embrace AI as a creative co-pilot!

AI + Human Expertise: A Winning Combo for Your Business

While this guide is designed to help you leverage AI to support your small business, providing tools, workflows, and step-by-step guides, there will be times when you need help beyond that.



- **AI is incredibly powerful, but it's not perfect**. It makes mistakes, requires guidance, and almost always produces results that need refinement.
- If you're new to marketing, accounting, or IT, using AI without foundational knowledge might feel like the blind leading the blind. **That's where human expertise comes in.**
- Whether it's interpreting AI-generated insights, refining strategies, or troubleshooting challenges, **having the right support can make all the difference.**

Our **expert team** at SharedTEAMS uses these tools to **create efficiency in our project execution** while passing along the savings to you, our members.

Because these AI tools are developing at such a fast rate, there are no standard best practices for how to best utilize these tools. But, we are on the cutting edge of standardizing AI workflows and strategies for your small business.

WE MAKE AI WORK FOR YOU, NOT AGAINST YOU.

SharedTEAMS®

Thank You