

Your New AI Teammate:

A Practical Guide to AI for Small Business,
Tourism and More.

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Part 1: The Imperative

Why We Must Adapt.





The One Thing to Remember Today:

The most **effective** way for any professional to thrive in the AI era is to adopt a "**teammate**" **mindset** and apply it through a simple, repeatable **4-step framework**.

Sense-Making > Decision-Making > Action-Taking > Learning

The New Reality



“Reflexive AI usage is now a baseline expectation at Shopify.”

Tobi Lutke, CEO
Shopify

Why This Matters to You



It's now longer *if* we should use AI, but *how*.

#1

Competitiveness

Those adopting are creating advantages.

#2

Capacity

AI helps you do more with the same resources.

#3

Clarity

AI sharpens your thinking & decision-making

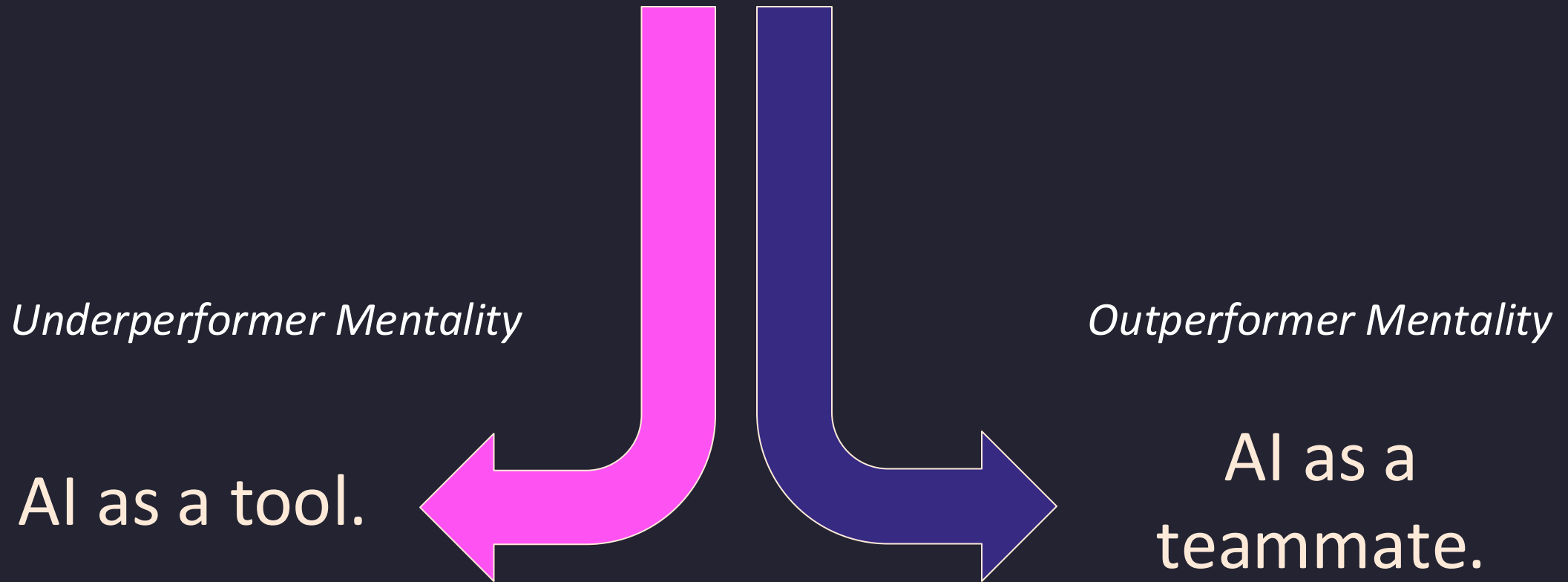
"People innovate, AI imitates." - Alexandra Ebert

Part 2: The Mindset

What to do.



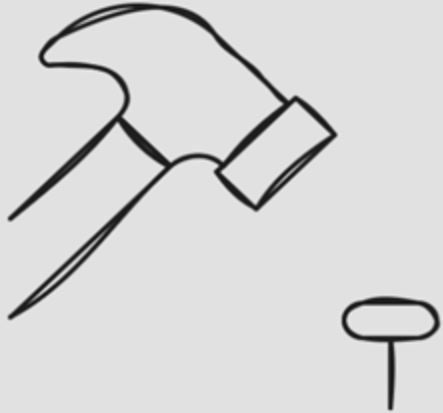
A Fork in the Road: The Realization Gap



Source: Jeremy Utley, "How Stanford Teaches AI-Powered Creativity in 13 Minutes."

Tool vs. Teammate

"Can you do this for me?"



"This tool doesn't work!"

VS

"What do you need to know from me in order to get the best response?"



"What are ten questions I should ask about this?"



Part 3: The Method

How to do it.



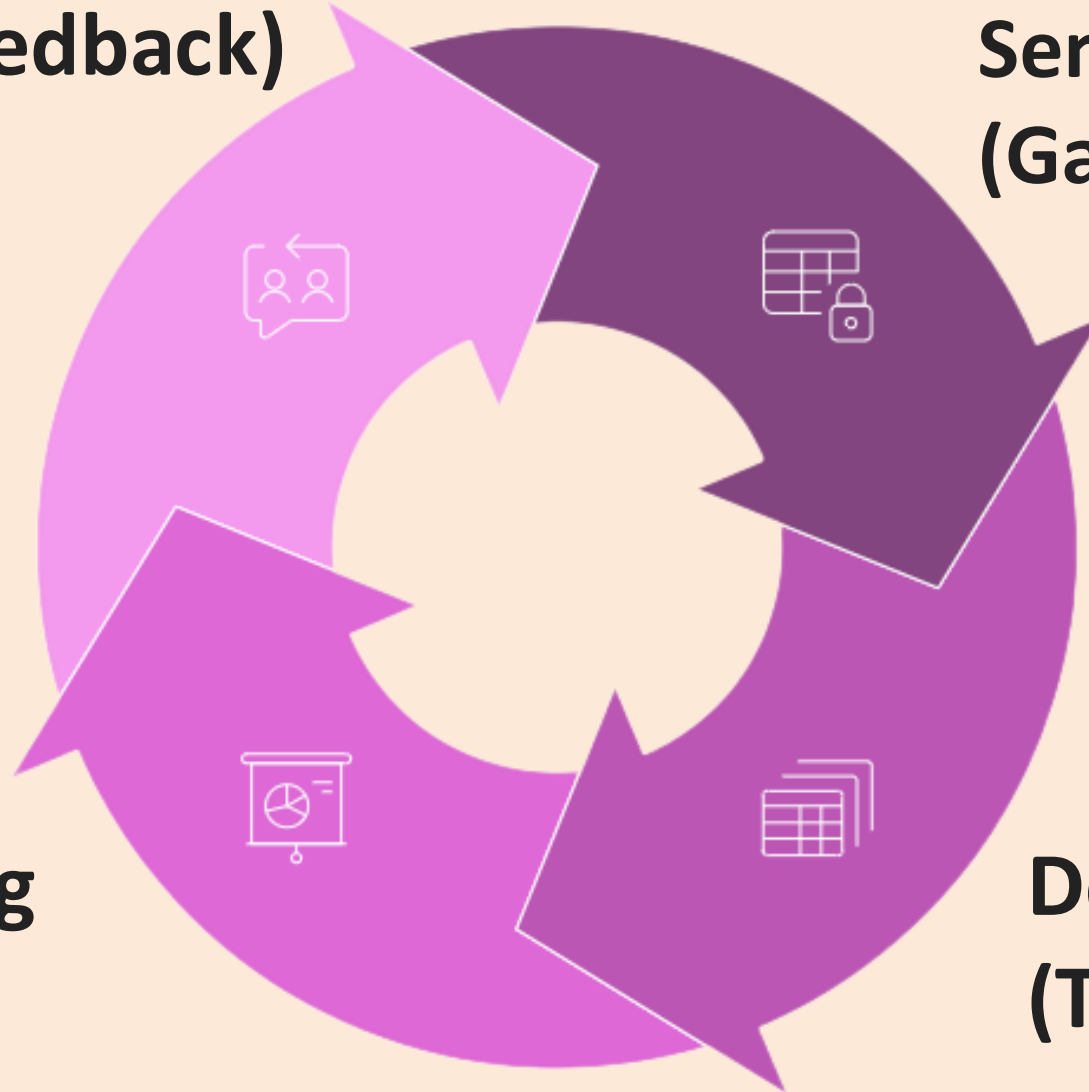
How All Knowledge Work is Done

Learning (Feedback)

**Sense-Making
(Gather Inputs)**

**Action Taking
(Output)**

**Decision Making
(Thinking/Analyzing)**



The 4-Step Playbook for Any Business Challenge



The Scenario: We'll follow Sam, who runs a successful vacation rental business in the Outer Banks. She wants to plan a new business expansion: adding "**Guided Kayak Eco-Tours**" to showcase the natural beauty of the region's waterways.

Step 1: Gather Insights (Input)

Step 2: Make Smarter Decisions (Processing)

Step 3: Create & Communicate (Output)

Step 4: Learn & Improve (Feedback)

The 4-Step Playbook: An Example



Input: Sense-Making

Goal: Use AI in **Explore Mode** to begin a dialogue and frame the right questions.

Sam's Challenge: Is a kayak eco-tour a good idea? She isn't even sure what she should be asking.

Her Prompt to her AI Teammate:

- I'd like your help exploring a new business idea. You're an expert in Outer Banks eco-tourism. I run a vacation rental business in Kitty Hawk and I'm thinking of adding guided kayak eco-tours. **Before we dive into research, what are the most important questions you would ask me to help validate this idea? Let's go through them one by one.**

The 4-Step Playbook: **Input: Sense-Making**

AI Output:

"Absolutely, Sam. I can definitely help you explore this. Acting as a tourism market analyst, my first step is always to understand the foundational assumptions of a plan. Before I pull any data, let's work through these key questions together:

1. **Your 'Why':** What is your personal or business motivation for adding this specific experience, beyond just revenue? (This will help us shape the story.)
2. **The Experience:** What is the one unique feeling or memory you want guests to leave with after a tour? (This defines your brand.)
3. **Your Unfair Advantage:** What unique assets do you already have? (e.g., exclusive access to a certain river entry point, a partnership with a local historian, etc.)

Let's start with the first question. What's your 'why'?"

The Problem With AI



The 4-Step Playbook: An Example



Processing: Decision-Making

Goal: Use AI as a strategic sparring partner to find the flaws in a plan together.

Sam's Challenge: She has a basic plan, but she knows it has blind spots.

Her Prompt to her AI Teammate:

- Okay, based on the key questions we just discussed, I've put together an initial plan: buy 10 kayaks and partner with one local guide. Before I go any further, I need you to be my sparring partner. **Let's review this plan together. Act as a skeptical business consultant and help me find the weak points. What do you see as the biggest potential risks or assumptions I'm making?**

The 4-Step Playbook: Processing

AI Output:

"Thanks for sharing your initial plan, Sam. Putting on my 'skeptical consultant' hat, let's find the pressure points to make this stronger.

The biggest potential risk I see is your **dependency on a single guide**. This creates an operational bottleneck and a single point of failure. If that guide is sick, has an emergency, or leaves, the entire new business is on hold.

The biggest **assumption** you're making is that the 10 kayaks represent the bulk of your startup costs. We should also factor in less obvious expenses like insurance, permitting, marketing, and a booking system.

Let's brainstorm some ways to mitigate that single-guide risk first. Have you considered a co-op model with other local guides?"

The 4-Step Playbook: An Example



Output: Action-Taking

Goal: Switch to **Execute Mode** and collaborate with AI to build a specific document.

Sam's Challenge: She needs to create a professional training document but is starting with just rough notes.

Her Prompt to her AI Teammate:

- Now we're ready to create the guide's training manual. I've written some rough bullet points for the main sections. **I need your help turning these notes into a polished, professional Standard Operating Procedure (SOP).** Your role is to be an expert in hospitality training. I'll provide the points for each section, and you can help flesh them out in a 'serene and professional' voice, adding any details you think are missing.

The 4-Step Playbook: Action-Taking

AI Output:

"Excellent. Here is that first section, expanded into a professional SOP format:

SOP 1.1: Pre-Tour Preparation (60 mins prior)

- **Equipment Audit:** Conduct a full safety and quality inspection of all kayaks, paddles, and Personal Flotation Devices (PFDs). Ensure all items are clean, functional, and meet safety standards.
- **Environmental Check:** Review the official weather forecast and water level reports for the tour route. Note any potential hazards (e.g., high winds, recent rainfall) to include in the guest briefing.
- **Guest Manifest Review:** Cross-reference the booking list with signed liability waivers. Make note of any specific guest needs (e.g., allergies, mobility issues) to address proactively."

The 4-Step Playbook: An Example



Feedback: Learning

Goal: Use AI as an **analytical partner** to interpret raw data and brainstorm solutions.

Sam's Challenge: She has raw customer feedback but needs help turning it into an action plan.

Her Prompt to her AI Teammate:

- I've uploaded a spreadsheet with unstructured feedback from our first 15 guests, and it's a bit of a mess. **Could you act as my customer experience analyst and help me make sense of it? First, can you read through and identify the key positive and negative themes? Then, we can brainstorm some practical, low-cost solutions for the negative points together.**

The 4-Step Playbook: Learning

AI Output:

"Thank you for sharing that feedback, Sam. I've analyzed the text from all 15 guests. Here are the key themes I've identified:

- **Key Positive Theme:** Overwhelmingly, guests praised the guide's deep knowledge of local ecology and engaging storytelling. This is your core strength and a major selling point.
- **Key Negative Theme:** The most common point of friction was confusion about the exact meeting point and parking situation, leading to some guests arriving late and stressed.

This is a great starting point. Now, as you suggested, **let's brainstorm together**. What are some practical, low-cost ways we could make the pre-arrival communication about the meeting point crystal clear?"

Mode Switching: Exploring vs Executing

Applying These Modes to the Knowledge Workflow:

- **Sense-Making = Explore Mode** (ask questions, generate options)
- **Decision-Making = Explore → Execute** (critique, then choose)
- **Action-Taking = Execute Mode** (produce and deliver)
- **Learning = Explore Mode** (review and ask new questions)

A Few More Things to Consider...



Your New Superpowers in the Age of AI



Adopting the AI Teammate mindset frees you up to do the remarkable, human-led work that truly matters.



Strategic Thinking

See the system and the leverage points faster.



Creativity

More ideas, quicker iterations, better mash-ups.



Critical Thinking

A built-in **sparring partner** to pressure-test plans, challenge your own assumptions and make your final output stronger.

Fast Tracking Your AI Journey



Building Your 'Personal Operating System'

How this works (today/tomorrow):

- 1. Today: Capture a 30-60 min voice dump** about your role, goals, workflows, frustrations, life, sports, favorite tv shows...really, anything goes. No rehearsing, no worries about being perfect. Just talk and transcribe using an app like Apple Notes or Otter.
- 2. Use the prompts I'll give you** with a 'Pro' version of either Gemini, ChatGPT or Claude:
Prompt #1: Paste the transcript to get a Personal OS summary.
Prompt #2: Use that OS to begin designing your AI integration plan and 'operating system'
- 3. Then:** Use the Daily Workflow Loop to make it a habit.



Prompt 1:

I want you to act as an objective analyst and strategist. I am providing you with a raw, unscripted data dump from a personal brain dump exercise. Your task is to analyze this text and create a concise "Personal Operating System" summary for me.

Please analyze the text and structure your response with the following sections:

Cognitive Style: How do I appear to process information, learn, and connect ideas?

Core Motivators: What seems to be the primary driver of my focus and energy (e.g., passion, duty, external validation)?

Potential Strengths: Based on the text, what are 2-3 of my likely strengths in a professional environment?

Potential Blind Spots: What are 2-3 areas or habits that might be holding me back?

Key Leverage Point: What is the single most impactful area to focus on for personal and professional growth?

Please provide direct, objective feedback. Avoid flattery and focus on clarity that can lead to actionable self-improvement. The analysis you provide will serve as the foundation for the next step.

Layout: Single "code"/chat bubble block. Use a slightly smaller mono font ($\approx 14-16$ pt) with generous padding so it photographs well.

Prompt 2:

I want you to act as an expert in AI strategy and personal development.

Your mission is to help me integrate AI as a thinking partner across my professional and personal life. To do this, ask me thoughtful questions—one at a time—about my role, responsibilities, workflows, goals, the tools I use, areas where I feel stuck, and my current AI experience until you have enough context.

Once you have a comprehensive understanding, provide four recommendations:

Five obvious, high-impact ideas I can start using immediately.

Five non-obvious or creative ideas that could be transformative in the long run.

For each recommendation, suggest specific AI platforms or tools that would be most useful.

My goal is to explore how AI can become a trusted strategist, coach, assistant, and creative collaborator to help me think better, live better, and move more confidently toward the life I want.

Layout: Single “code”/chat bubble block using the same style as Slide 26 for consistency.

Making AI a Part of Your Daily Workflow

Capture — Explore: Voice/text dump anywhere.

Clarify — Explore→Execute: Ask AI to pull tasks/decisions/refs.

Plan — Execute: Calendar blocks + due dates.

Execute — Execute: One task, one block.

Review — Explore: AI summary + one priority for tomorrow.

Tools

Capture (Explore):

- **Otter** → live transcribe meetings & voice dumps
- **Apple/Google Voice Memos** → quick capture on the go

Clarify (Explore→Execute):

- **NotebookLM** → digest docs, build source-grounded briefs
- **Gemini** → integrated with Gmail/Docs, useful for organizing messy inputs

Plan (Execute):

- **ChatGPT** → structured prompts for planning & drafting
- **Claude** → excels at long context (big docs, policy guides, transcripts)

Tools

Execute (Execute):

- **ChatGPT or Gemini** → create outputs (emails, content drafts, toolkits)
- **Canva AI / Microsoft Copilot** → polish and format into usable assets

Review (Explore):

- **NotebookLM** → compare drafts against original sources for accuracy
- **Claude** → cross-check for blind spots with large context windows



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