



DeMystifying AI:

A small business owner's guide to the AI revolution

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From Potential to Performance.



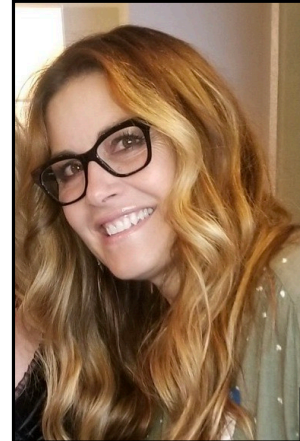
Image generated by MS Designer AI



About Me

- AI4BI / GTM Strategies / Competitive Positioning
- Leverage AI & psychology for smarter decision making, business planning & competitive advantage
- Marketing & MFC Therapist by training
- Award-winning serial entrepreneur - AIC 2011, Colnatec
- Metro Phoenix since 1997
- Sporty Nerd – hikes, bikes, dogs, sons, research papers

Original photo



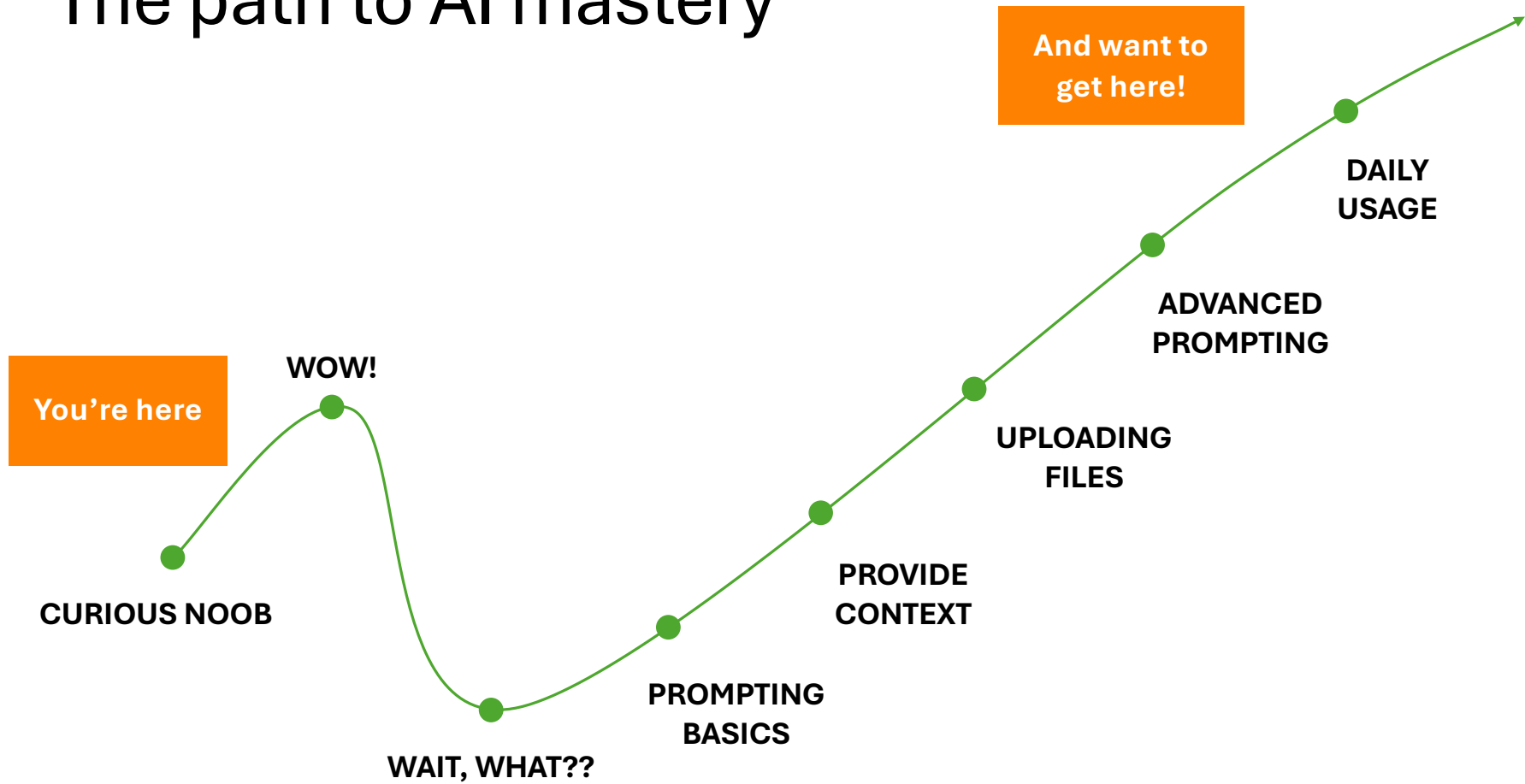
AI-generated headshot by Aragon.ai





My AI Journey

The path to AI mastery

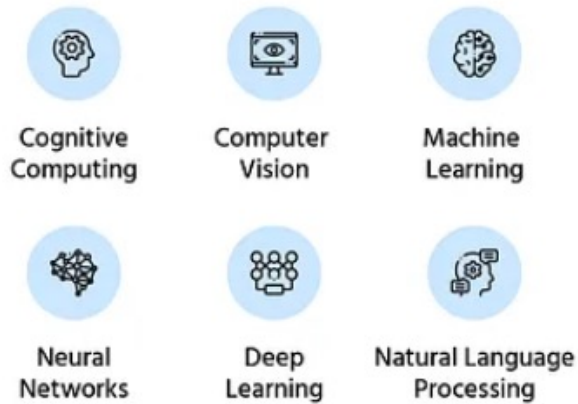


Agenda

- AI Overview
- How do I use Generative AI?
- Why should you use GenAI?
- How I talk to my co-pilots
- Set up your AI workspace
- Learn some prompting



What is AI?



Definition of AI

AI stands for Artificial Intelligence, which refers to the development of computer systems that can perform tasks that historically required human intelligence.

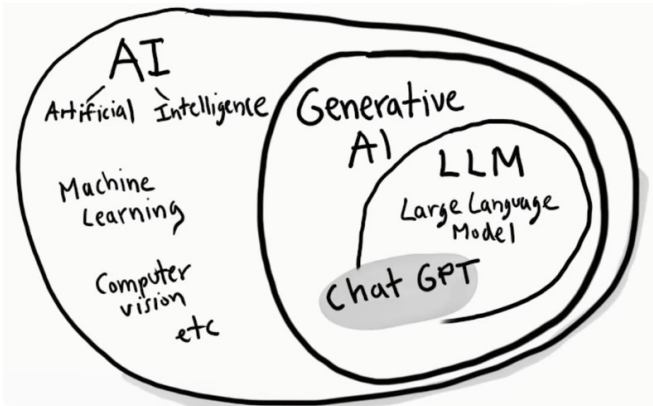


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What it's not

AI encompasses a variety of technologies, including machine learning and natural language processing. **AI does not mean sentient machines**; it's about using data and algorithms to perform specific tasks.

What is an LLM (Large Language Model)?



Source: Generative AI in a Nutshell, Henrik Kniberg, 2024

Introduction to LLMs

LLMs are advanced AI models designed to understand and generate human-like text based on vast amounts of data.

Generative AI: Generative AI creates new content like text, images, audio, and code, while LLMs are a subset focused on generating human-like text.



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How LLMs Work

Pretraining: Exposing the model to a massive amount of text data to learn grammar, facts, and reasoning abilities.

Fine-tuning: Training with specific datasets, using demonstrations and comparisons provided by human trainers.

Consumer-ready generative AI models

THE MOST CAPABLE



OpenAI
ChatGPT4



Anthropic
Claude

THE ECOSYSTEMS



Google
Gemini



Microsoft
CoPilot

THE NICHE PLAYERS

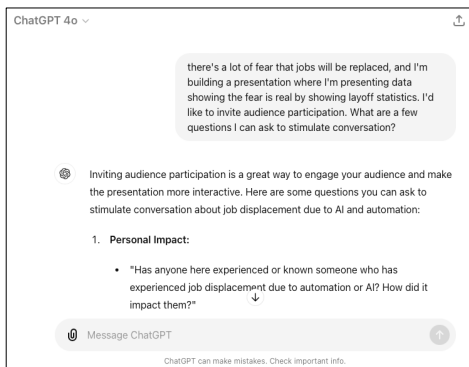
Perplexity
(For search)

Quora Poe
(For variety)

Inflection Pi
(For therapy)

Open Source
(It's complicated)

Capabilities of ChatGPT and Other LLMs



Comprehension and Interpretation

Ability to understand and interpret input in a conversational manner.



Contextual Memory

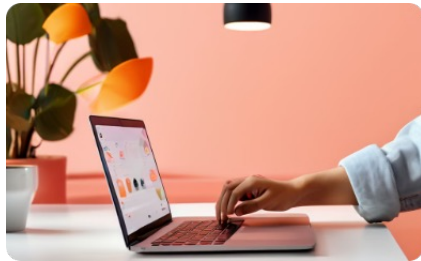
Maintaining context over multiple interactions for more accurate responses.



Factual Inquiries

Excelling in answering factual questions and providing detailed explanations.

Practical Applications of AI



Efficiency in Information Retrieval

Quickly retrieve information, definitions, or explanations related to work topics.



Task Reminders and Management

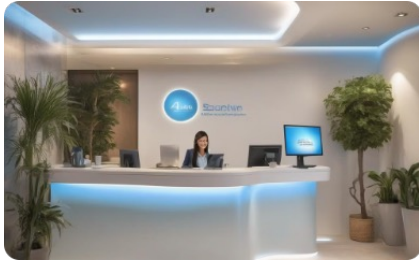
Virtual assistant capabilities for setting reminders, managing tasks, and staying organized.



Writing and Editing Support

Assistance with drafting emails, crafting reports, and editing documents.

Common Use Cases



Improving Customer Experiences

Personalized interactions and support to enhance customer satisfaction.



Leveraging Data-Driven Insights

Analyzing data to uncover valuable business insights.



Automating Tasks

Streamlining repetitive tasks for greater efficiency.

Understanding AI's Competitive Advantage



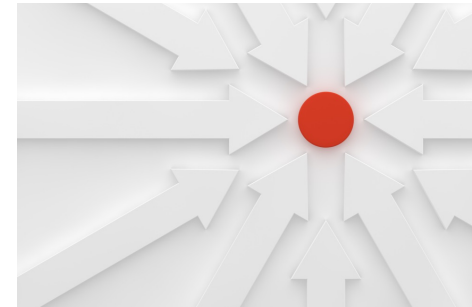
Enhancing Productivity

AI can streamline workflows and maximize efficiency, helping businesses accomplish more with less effort.



Fostering Innovation

AI enables creative solutions and new business opportunities, driving innovation and growth.



Improving Decision-Making

AI provides data-driven insights and recommendations, empowering businesses to make more informed decisions.

Risks and Considerations



Data Privacy and Security

Protecting sensitive information is crucial as AI systems handle vast amounts of data. Scrub your data of personally identifying information.



Hallucinations

When an AI model confidently provides factually incorrect or nonsensical information.

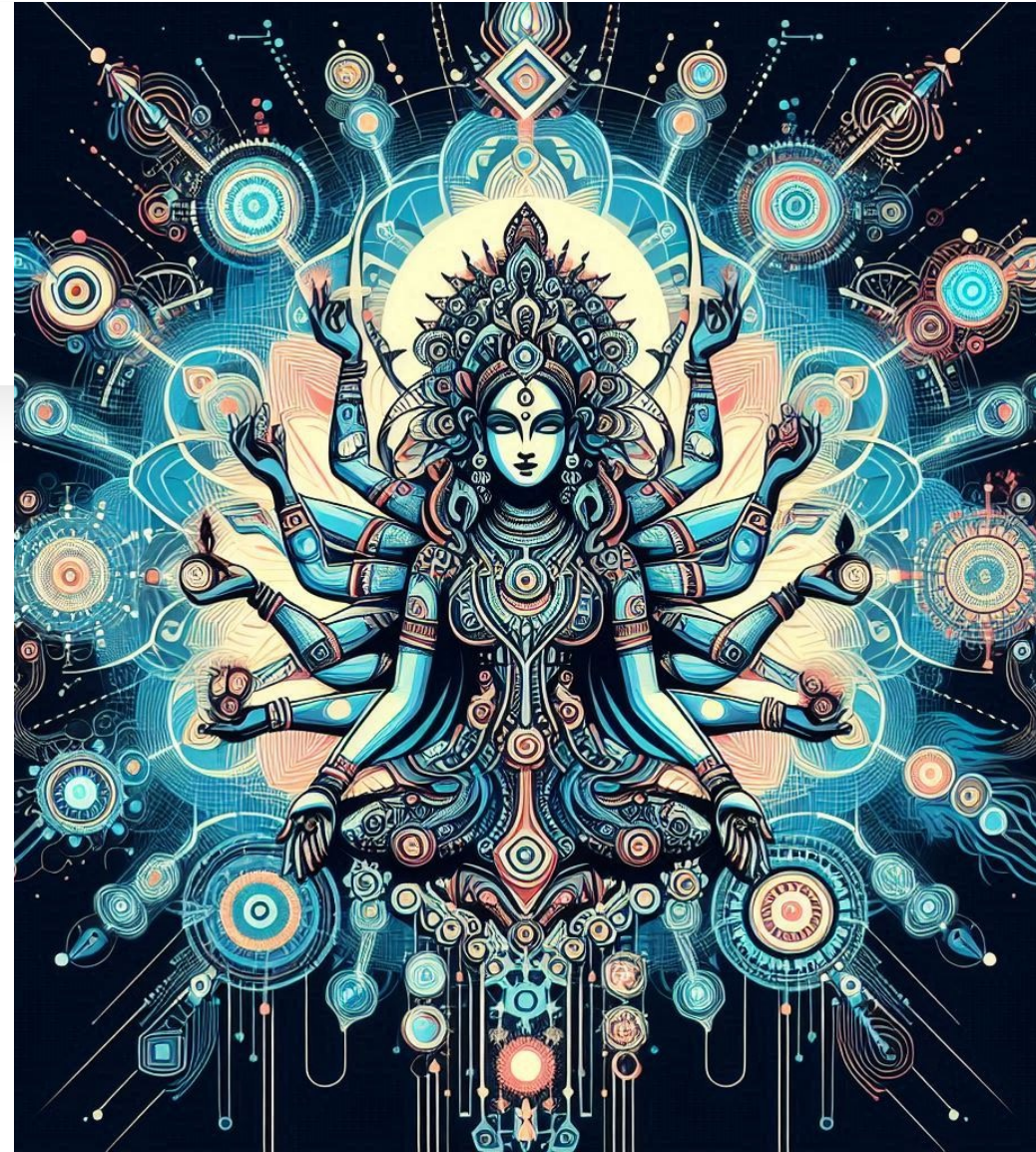


Ethical Considerations

Addressing biases and ensuring fair use of AI is necessary to avoid unintended consequences.

You have a new teammate with superpowers

- Knows all the Internet's information
- Learns incredibly quickly
- Is highly logical, data-driven, and unemotional when making decisions
- Is analytical + highly creative
- Is infinitely patient and eager to please
- Doesn't get tired or bored
- **Can move across domains, functions, or disciplines seamlessly**





But this teammate has flaws

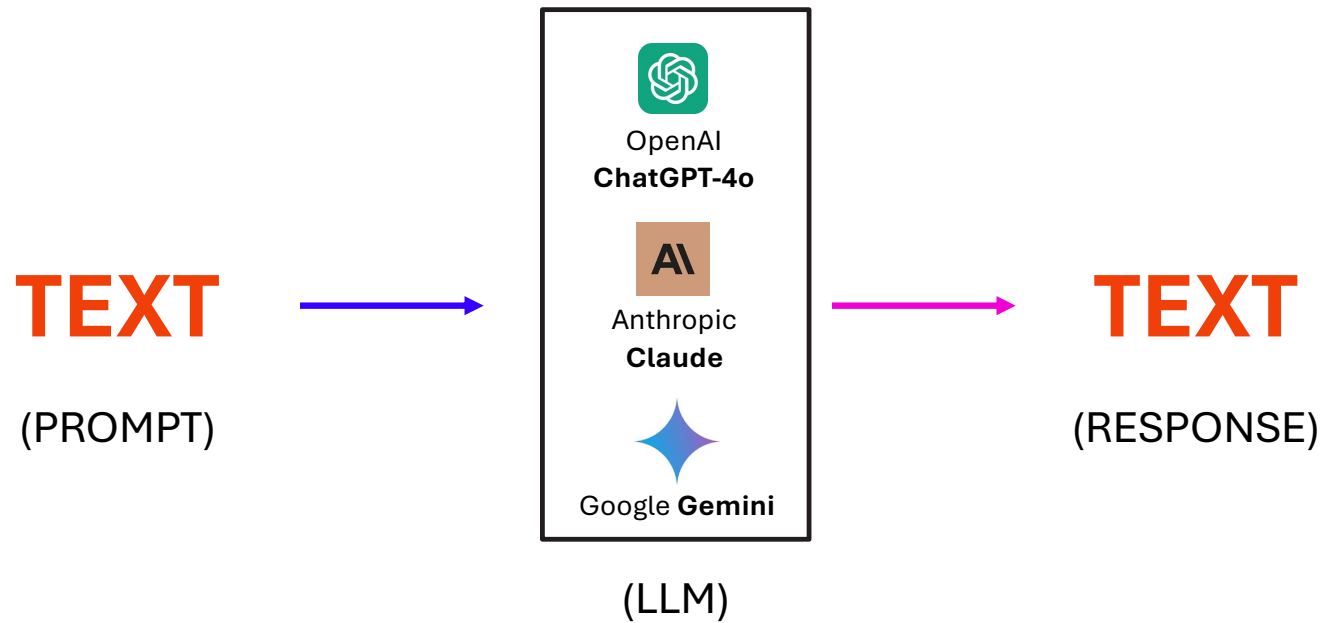
- Imagine a teammate who...
 - Has “hallucinations” – aka makes up answers to avoid having no answer
 - Over-confident, sometimes to a fault – it’s tough to tell when they’re making up an answer
 - Has biases – they’re so eager to please, they may tell you what you want to hear
 - Might perform great one day, and then terribly the next (on the same task)

What makes these new models special?

- It feels like they understand us
- They can carry a natural conversation
- They remember what we're talking about
- They're surprisingly adept at "thinking" tasks
- They seem to have personality and emotions



It's like magic (some days)



*A computer interaction that **feels** like a natural conversation.*

Two ways to get value



HUMANPOWER

*Replace lots of small,
repetitive tasks*



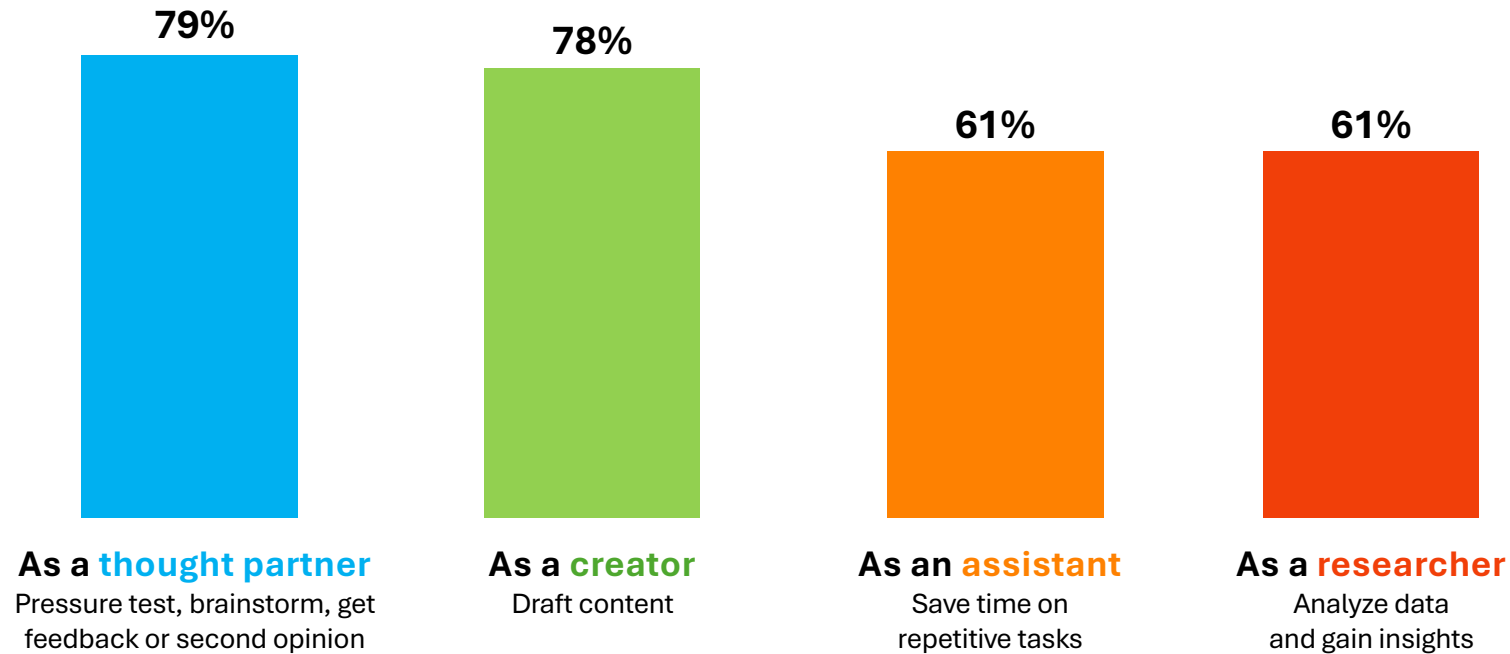
BRAIN POWER

*Augment 2-3 high value,
less frequent tasks*

It's not just about writing better emails


How are you using AI today?

March 2024, n=190 respondents



Source: Section AI Readiness survey, March 2024.

The Strategic Triad: AI's three key roles



ASSISTANT
Cut out drudge work

Sample use cases


Summarize and synthesize content

Generate reports and executive summaries

Take notes & prep for meetings

Analyze qualitative and quantitative data

Analyze text documents



CREATOR
Build your first draft

Sample use cases


Generate LinkedIn posts in your voice

Draft product briefs and specs

Draft employee reviews

Create a presentation

Design an image



STRATEGIST
Be your thought partner

Sample use cases

Think through a complex plan

Critique a decision for unintended consequences

Critique a presentation

Role play a conversation

Scenario plan

Give you feedback on your plan

Conversing with your AI - My personas



EMPLOYEE

- Directing -



PARTNER

- Collaborating -



EXPERT

- Learning -



It's affecting the workplace

~50%

**Of employee work
activities could be
automated**

168%

**Increase in
productivity**

76%

**# employees already
using it, with or without
company knowledge**



Work Trends Index Summary

What Can Copilot's Earliest Users Teach Us About Generative AI at Work?



Research findings from early Copilot users

70%

said they were more productive

29%

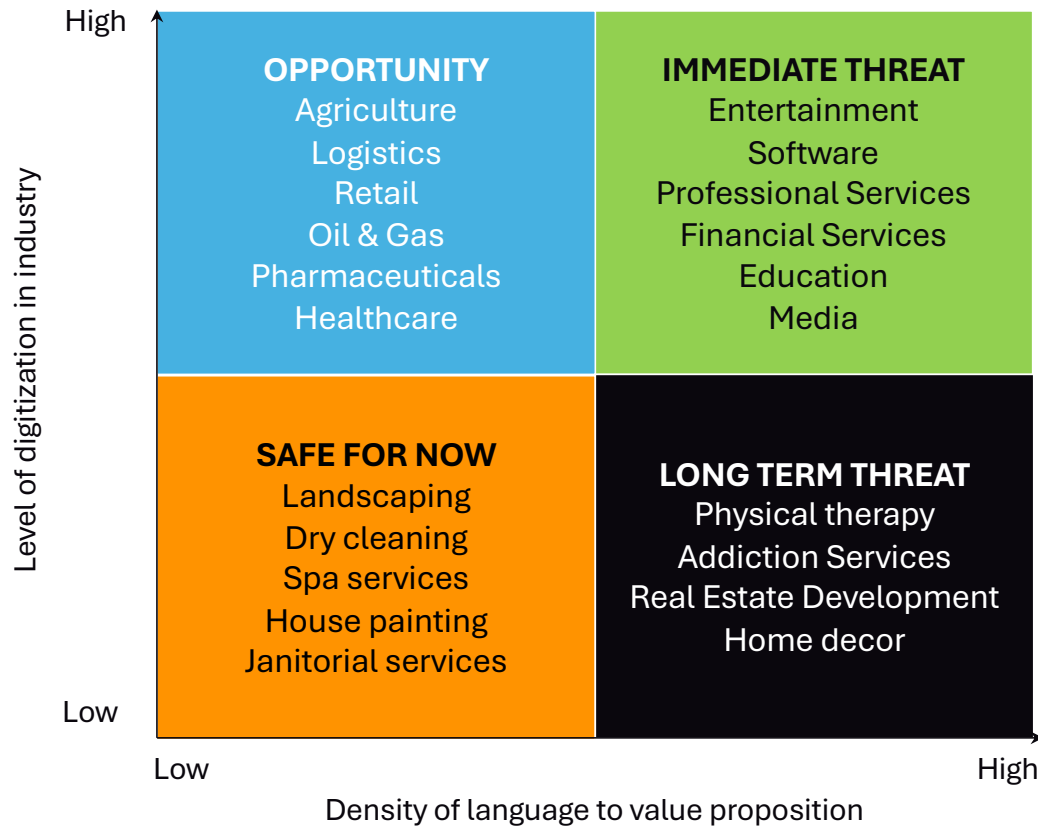
faster overall in a series of tasks (searching, writing, and summarizing)

Nearly 4x faster catching up on a missed meeting

77%

said they didn't want to give it up

Not all industries will be affected equally



Source: GAI Insights

Getting Started







Set up your AI workspace

- Pick your models (LLMs)
- Decide how you'll handle sensitive information
- Prep your custom instructions (GPT-4o)



LLM Models – Your starter tech stack



	Rating	Evaluation
 ChatGPT-4o from OpenAI	A+	Business workhorse; Custom GPTs can be extremely helpful time savers START FREE
 Claude from Anthropic	A+	Best for creative writing, friendliest - START FREE
 Perplexity	A+	Best search engine, great for research, provides links – START FREE
 Microsoft Copilot formerly Bing Chat	B+	Uses ChatGPT-4 and DALL-E, but limited to 30 inquiries; provides links
 Gemini formerly Bard	B	Another workhorse that integrates with Google products, but wonky, hallucinates
 Chat GPT-4	B	Hallucinates more than GPT-4, so use with caution and always fact check. Custom GPTs rock

Decide how
you'll handle
sensitive
information in
your prompts



Settings



⚙️ General

🧪 Beta features

📄 Data controls

Chat history & training



Save new chats on this browser to your history and allow them to be used to improve our models. Unsaved chats will be deleted from our systems within 30 days. This setting does not sync across browsers or devices. [Learn more](#)

Shared links

Manage

Export data

Export

Delete account

Delete

Prep your custom instructions (GPT-only)

Give GPT some CONTEXT on you...

- **What should GPT know about you?**
 - Job, work history, role in company
 - Company industry, size, and target customer
 - Budget, Team size, constraints
 - Personal interests
- **How do you want GPT to behave?**
 - What's your risk tolerance?
 - How creative/analytical should GPT be in its answers?
 - What should GPT's output look like (tables, bullets, etc.)?

Custom instructions ⓘ

What would you like ChatGPT to know about you to provide better responses?

0/1500

How would you like ChatGPT to respond?

Be highly organized. Provide detailed explanations.
Treat me as an expert in all subject matters.
Mistakes erode my trust, so be accurate and thorough.
Respond to questions only if you know the answer or can make a well-informed guess; otherwise tell me you don't know it.
Refrain from disclaimers about not being a professional/expert.
Keep responses unique and free of repetition.
If unclear/ambiguous, ask for more details to confirm understanding before answering.

0/1500

Enable for new chats

Cancel

Save



Writing compelling prompts

Not all prompts require all building blocks. "As a [Role], [Task Description] for [Context]."

Please adhere to [List Specific Requirements]. Avoid [Boundaries]. Explain your reasoning."

BASIC PROMPTS

Task
Description

Context

FOCUSED PROMPTS

Task
Description

Role

Context

Specific
Requirements

COMPREHENSIVE PROMPTS

Task
Description

Role

Boundaries

Context

Specific
Requirements

Reasoning

Basic (but good) Prompts



USE CASE

Simple, straight forward tasks with almost no requirements

STARTER TEMPLATE

“[task description] for [context]”

EXAMPLE #1

“Generate a catchy tagline for a new sports drink that emphasizes its refreshing quality.”

EXAMPLE #2

“Create an email subject line for a 30% off seasonal sale campaign.”

EXAMPLE #3

“Develop a meal plan for a vegetarian family that accounts for a tomato allergy.”

Focused/Advanced Prompts



USE CASE

More specific tasks where the output would vary depending on the role AI is holding, and have specific requirements like format, style, scope, etc.

STARTER TEMPLATE

"As a [Role], [Task Description] for [Context]. Adhere to [List Specific Requirements]."

EXAMPLE #1

"As a project manager, create a risk assessment for the upcoming software deployment. Please adhere to the SWOT analysis format."

EXAMPLE #2

"As a content marketer specializing in digital marketing, write the introduction for a blog post about the importance of social media marketing in today's business landscape for an audience of small business owners. Adhere to an informative but engaging tone, and keep it between 5-6 sentences"

Comprehensive Prompts



USE CASE

Outputs with a complicated set of specifics, where fact checking and accuracy are crucial.

STARTER TEMPLATE

"As a [Role], [Task Description] for [Context]. Please adhere to [List Specific Requirements]. Avoid [Boundaries]. Explain your reasoning for [xx]?"

EXAMPLE

"As a coach roleplaying as my manager, respond and react realistically based on my arguments for increasing my compensation based on my performance."

Please adhere to just roleplaying and only provide me constructive feedback on how I did at the end. Focus on my negotiation tactics, responses, and tone. Be thoughtful, constructive and blunt.

Avoid departing from a calm professional tone. Explain your thinking behind your responses and feedback."

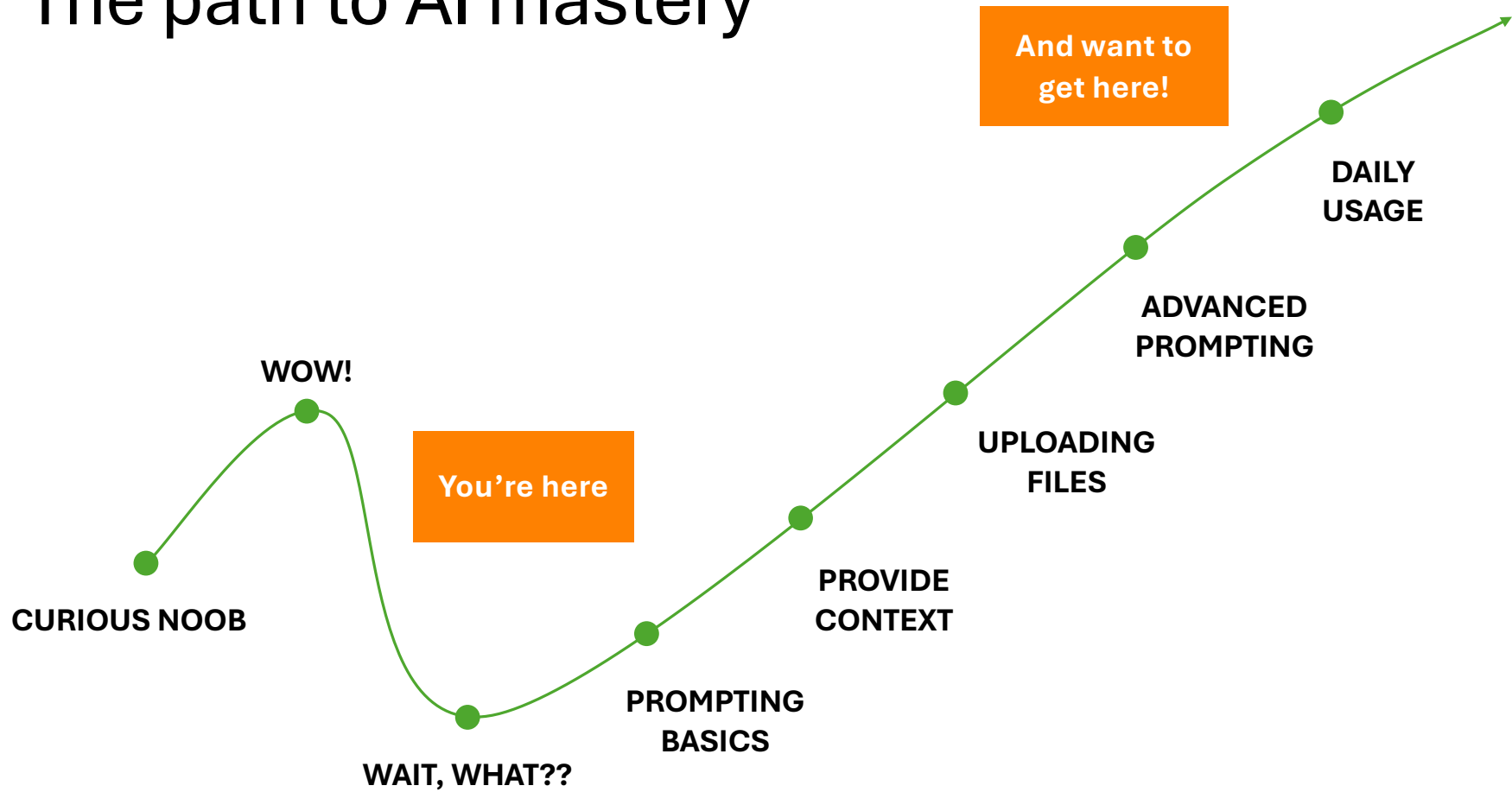
It might feel daunting to start the process.

The key is to start with a small, specific task.

15 minutes a day. Make it a habit.



The path to AI mastery





Questions & Resources



Potentiate Blog



The Rundown AI



Section School



"State of AI 2024"
by Stanford HAI



One Useful Thing by
Ethan Mollick

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Today's Tech Stack

- ChatGPT-4 – Brainstorming
- Anthropic (free) – Summarizing
- Microsoft Designer AI – Image generation
- Perplexity (free) – Search
- Aragon.ai - Headshot

• wendy@potentiate.net



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Extra Slides