

SME Strategy • Practical AI Adoption

## The SME AI Strategy Starter Kit

A practical workbook that helps business owners and leadership teams move from AI curiosity to clear, commercially useful action.

### Inside this kit

- An SME AI readiness checklist
- A simple automate / augment / protect framework
- An AI opportunity finder and “one workflow, one win” planner
- Prompt starters for strategy, workflows, marketing, sales, and SOPs
- A 30-day action plan, adoption prompts, and worksheet space

---

**Presented by BusinessLife.Style**

Helping SMEs across the UK use AI to save time, improve decisions, and strengthen business performance.

# How to Use This Starter Kit

This starter kit is designed to help you move from curiosity about AI to a clearer, more structured plan for your business. It is practical by design: use it to identify where AI could genuinely help, where human judgement should remain central, and what one realistic improvement you could test first.

How to use it best:

- 1) Work through the pages in order.
- 2) Focus on one business challenge at a time.
- 3) Use the worksheets to capture ideas and actions.
- 4) Choose one practical improvement to test in the next 30 days.

## What this kit will help you do

- Spot repetitive tasks, bottlenecks, and process pain points.
- See which activities should be automated, AI-assisted, or protected as human-led.
- Choose one workflow where AI could create a meaningful improvement.
- Use prompt templates to support planning, content, customer service, or operations.
- Build a simple action plan that can be tested safely and consistently.

Simple principle: do not try to do AI everywhere. Start by identifying one repetitive, painful, or commercially important activity and use AI to improve that workflow in a controlled, measurable way.

# 1. The SME AI Readiness Checklist

Use this checklist to review how ready your business is to adopt AI in a structured, low-risk, high-value way. Score each question from 0 to 4, then add the scores together.

Scoring guide: 0 = not considered / no, 1 = early thinking, 2 = partly in place, 3 = mostly in place, 4 = clear, documented, and used consistently.

Area	Question to consider	Score 0-4
Strategy	Do we know what business outcomes we want from AI?	
Time-saving	Which tasks take too long, happen too often, or slow the team down?	
Sales & marketing	Could AI help with content, lead follow-up, proposals, or communication?	
Operations	Are processes documented, or do they mainly live in people's heads?	
Customer service	Are we repeatedly answering similar questions or handling similar enquiries?	
Risk	Do we have a process for checking accuracy, privacy, tone, and brand fit?	
Team adoption	Would staff know how to use AI consistently and responsibly?	

Total score	Meaning
0-7	AI curious, but not yet ready. Start with awareness, confidence, and one small low-risk test.
8-15	Some practical opportunities are visible. Choose one workflow and create a simple first experiment.
16-23	Ready for structured AI adoption. Prioritise use cases, build templates, and train the team.
24-28	Strong candidate for implementation support, optimisation, and process improvement.

## Note your initial observations

---



---



---



### 3. AI Opportunity Finder

Think about the tasks, bottlenecks, and recurring frustrations in your business. The most useful AI opportunities usually exist inside daily operations rather than in flashy experiments.

Business area	Current frustration	Time / cost impact	Could AI help?	Priority
Marketing				
Sales				
Admin				
Operations				
Customer service				

#### Prompt questions

- What task do you repeat every week?
- What work often gets delayed?
- Where do mistakes or inconsistencies happen?
- What information do you keep rewriting or explaining?
- Which activity, if improved, would free up the most time or value?

**My top opportunity**

---



---



---

## 4. One Workflow, One Win Planner

Choose one important workflow to improve with AI. Focus on one specific process where a small, practical change could save time, reduce friction, or improve consistency.

Section	Your notes
Workflow to improve	
Current problem	
Desired outcome	
AI role	
Human review points	
Success measure	
First test this week	

### Example

Section	Example
Workflow	Following up new enquiries
Problem	Leads are followed up inconsistently and too slowly.
Outcome	Same-day, more consistent first responses.
AI role	Draft follow-up messages based on enquiry type.
Human review	Owner approves before sending.

## 5. Prompt Starter Pack

These prompt starters give you practical ways to use AI for strategy, workflows, marketing, and day-to-day business thinking. Adapt them to suit your own business context.

### Business strategy prompt

Act as a practical business strategy adviser. Help me review this business challenge: [describe challenge]. Consider commercial impact, customer value, operational difficulty, risks, and next steps. Give me a clear recommendation and a simple action plan.

### Workflow improvement prompt

Review this business process: [describe process]. Identify repetitive steps, delays, decision points, handoffs, quality risks, and opportunities to use AI. Recommend what should be automated, what should be AI-assisted, and what should remain human-led.

### Marketing content prompt

Using the following information about my business, create a 4-week content plan for [audience]. The goal is to [goal]. Keep the tone [tone]. Include post ideas, key messages, calls to action, and suggestions for repurposing.

## 6. More Useful SME Prompts

### Sales follow-up prompt

Create a friendly and professional follow-up email for a prospective client who asked about [service/product]. The goal is to continue the conversation, answer likely concerns, and suggest a clear next step. Keep it natural and not pushy.

### Customer FAQ prompt

Based on these common customer questions, create clear, helpful FAQ answers in our brand tone. Keep the answers accurate, concise, and suitable for use on a website or in email replies: [insert questions].

### SOP creation prompt

Turn this recurring task into a simple standard operating procedure. Include purpose, when to use it, step-by-step instructions, tools needed, quality checks, and common mistakes to avoid: [describe task].

### Scenario planning prompt

Compare these options: [option A], [option B], [option C]. Assess them against cost, speed, risk, customer impact, and long-term strategic value. Recommend the best option and explain the trade-offs.

## 7. AI Safety and Quality Checklist

Use this checklist whenever you create, review, or adopt AI-assisted work. It helps reduce errors, protect trust, and keep AI use commercially responsible.

- Have we checked the output for accuracy?
- Have we avoided putting confidential information into public AI tools?
- Is the tone suitable for our brand and audience?
- Could the output be biased, misleading, or incomplete?
- Does a human need to approve this before it is used externally?
- Have we documented the prompt or process so it can be repeated?
- Are we using AI to improve quality, not just produce more generic content?
- Could poor use of AI damage trust with customers, staff, or partners?

Responsible adoption is not about avoiding change. It is about making AI useful, trusted, and repeatable.

**Notes: where do we need stronger safeguards?**

---

---

---

---

---

## 8. 30-Day SME AI Action Plan

Use this simple 30-day plan to move from ideas to action. Keep the first project small, measurable, and relevant to the business.

Week	Focus	Action
Week 1	Audit	List recurring tasks, bottlenecks, and time-wasters.
Week 2	Prioritise	Choose one workflow with clear value and low risk.
Week 3	Test	Create prompts, templates, or a simple AI-assisted process.
Week 4	Embed	Review results, document the process, and decide next improvements.

**My 30-day AI goal**

---



---

**The outcome we want**

---



---

**We will know it has worked when**

---



---

## 9. AI Use Case Menu for SMEs

Use this menu for inspiration. The right use cases depend on your business model, customer needs, and current bottlenecks.

Business function	Possible AI use cases
Strategy	Business planning, research, option comparison, decision support.
Marketing	Content ideas, outlines, campaign planning, repurposing, email drafts.
Sales	Lead qualification, proposal drafting, follow-up emails, objection handling.
Customer service	FAQ responses, enquiry triage, service scripts, knowledge summaries.
Operations	SOPs, process mapping, checklists, meeting summaries, handover notes.
Finance	Cash-flow explanation, scenario planning, invoice chasing templates.
HR / people	Role descriptions, onboarding guides, training materials.
Events	Event planning, attendee communications, sponsor proposals.

**Which use case feels most relevant right now?**

---



---



---



---



---



---



---

# 10. Your AI Opportunity Scorecard

Use this quick scorecard to compare a few possible AI opportunities. Score each idea on value, ease, risk, and commercial relevance.

Opportunity	Value 1-5	Ease 1-5	Risk 1-5	Priority
1				
2				
3				
4				

How to choose: start with a project that is useful enough to matter, simple enough to test, and low-risk enough to manage. Focus on one clear business outcome first.

**Best first project**

---

---

---

---

---

---

---

---

# 11. Team Adoption Mini-Plan

If your team will be using AI, think about ownership, guidance, training, and review. Adoption is easier when expectations are clear.

Question	Your notes
Who will own the pilot?	
What guidance or rules are needed?	
Which prompts or workflows should be documented?	
What training or support will people need?	

## Good adoption habits

- Start with one process and one owner.
- Record your best prompts and examples.
- Review outputs before external use.
- Create simple success measures.
- Refine and improve over time.

## 12. Next Step Options

Once you have identified one or two practical opportunities, the next step is to decide how you want to build momentum. These routes can work independently or as part of a wider support journey.

Option	Best for
Attend an AI readiness workshop	Business owners who want a friendly introduction and practical ideas.
Book an AI opportunity audit	Businesses that want personalised recommendations and prioritised actions.
Start a 30-day AI strategy sprint	Businesses ready to implement AI more properly and consistently.

What help might you find most useful right now? Tick an option, note a goal, or use this page to prepare for a conversation.

**Notes and next actions**

---

---

---

---

---

---

---

---

---

---

# About BusinessLife.Style

BusinessLife.Style helps SMEs across the UK clarify their strategy, strengthen their operations, and adopt AI in practical, commercial ways. We help business owners and leadership teams identify the workflows that waste time, create friction, or limit growth, then use AI to improve those workflows in a sensible, measurable way.

## How we can help

- AI opportunity audits and workflow diagnostics
- AI readiness workshops for SMEs across the UK
- Prompt packs and practical implementation support
- 30-day AI strategy sprints and first-win projects
- Ongoing optimisation and support for AI adoption

Helping SMEs move from AI confusion to practical, profitable adoption.

### Contact / booking details

**Email:** [info@BusinessLife.Style](mailto:info@BusinessLife.Style)

**Web:** [www.BusinessLife.Style](http://www.BusinessLife.Style)

---

Get in touch to discuss an AI opportunity audit, workshop, strategy sprint, or tailored support for your SME.

