

WORKSHEET

Choose one practical task.

A small, repeatable starting point is enough. Use general descriptions or fictional examples here, not private business records.

01 THE TASK

Who does it, and when? Example: an office coordinator drafts a customer update.

02 THE INPUTS

What approved notes, documents or figures does that person need?

03 THE OUTPUT

What should a useful draft or answer contain? What must it leave out?

04 THE REVIEWER

Who checks the facts and approves sending, changing records or taking action?

05 THE BOUNDARIES

What information must stay out? Which actions always require permission?

06 THE TOOLS

Which devices and tools are involved? Who approves access or new software?

07 THE SUCCESS CHECK

What will you compare? Try completion time, corrections or missing details.

Bring this to a free 20-minute call. Visit smbsentinel.ai/contact to discuss your starting point. No email is required to download this worksheet.

SAMPLE ENGAGEMENT DELIVERABLE - FICTIONAL EXAMPLE

A task guide your team can repeat.

Example: approved job notes into a draft customer update. This is a sample training handout, not a client case study or a claim about measured results.

THE SETUP

Use an organization-approved AI tool in an account the business owns. The office coordinator drafts; the designated reviewer approves. Nothing is sent automatically.

APPROVED SAMPLE INPUT

Job reference: SAMPLE-104. Inspection complete. Replacement part is needed. Price and arrival date are not yet confirmed. The office needs to confirm both before scheduling.

REUSABLE INSTRUCTION

Using only the approved notes below, draft a short, plain-language customer update. Do not invent a price, date or completion promise. Separate confirmed facts from missing details. End with an internal checklist for the reviewer. Do not send anything.

ILLUSTRATIVE DRAFT

The inspection for job SAMPLE-104 is complete and a replacement part is needed. The part price and arrival date are not yet confirmed. Our office needs to confirm those details before scheduling the next visit.

REVIEW BEFORE USE

Check the job reference and facts against the source. Confirm price and timing with the responsible person. Remove the internal checklist from the customer message. Only an authorized person sends the approved update.

STOP & ASK FOR HELP

Stop if the source is missing, the draft invents a detail, or the tool requests new access. Do not include passwords, payment details or sensitive customer or employee records.

A SIMPLE SUCCESS CHECK

Try several approved examples. Record the time taken and corrections needed, and whether a team member can repeat the task without coaching. Compare with the previous process before claiming an improvement.