



AI ACADEMY

Your 25-Point AI Action Plan

A plain-English guide to getting started with AI in your business

No jargon. No overwhelm. Just five practical steps forward.

25

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Get better answers faster

"Order Leads to Growth."

AI Academy — A branch of Social Media Academy

This plan is designed to be your companion, not your taskmaster.

Work through it at your own pace. One step at a time beats ten steps abandoned.

Do It in Order

01

The five phases are designed to build on each other. Phase 1 before Phase 2, Phase 2 before Phase 3 and so on. Each step gives you the foundation for the next one. Jumping ahead is tempting — resist it. Getting the basics solid first makes everything else easier.

One Thing at a Time

02

Complete each action before moving to the next. It sounds obvious, but it's easy to skim five steps and do none of them properly. The goal is to actually do this — not just read about it. Even if it takes a while to work through each phase, that's absolutely fine.

Progress Over Perfection

03

Your first AI conversation won't be perfect. Your first prompt won't get the ideal response. That's completely normal and expected. The businesses that get the most out of AI aren't the most technically capable — they're the ones who started, made mistakes and kept going.

Come Back to AI Academy When You're Ready to Go Further

04

This plan gets you confident with the basics. Once you're comfortable here, AI Academy can help you take the next step — connecting your tools, building smarter workflows and eventually setting up automations that run your business in the background. One thing at a time.

The first step — picking the right tool for you

Before you do anything else, you need to pick one AI tool and stick with it while you find your feet. Don't try several at once — that's the fastest route to confusion. We recommend Claude or Gemini. If your business runs mostly on Microsoft, Copilot is worth a look too.

Understand What These Tools Actually Are

01

Claude, Gemini and Copilot are AI assistants — think of them as a very clever colleague you can talk to in plain English. You type (or speak) what you need, and they help you think, write, plan and work things out. No coding. No technical knowledge needed.

TIP: Don't overthink this. If you can send a text message, you can use these tools.

Choose Claude if You Want the Best Thinking Partner

02

Claude (made by Anthropic) is brilliant for writing, thinking through problems, planning and having proper back-and-forth conversations about your business. It's thoughtful, careful and very good at understanding context. It has a free version, and Claude Pro costs around £17 a month.

TIP: Head to claude.ai to get started. The free version is a great place to begin.

Choose Gemini if You're Deep in Google

03

Gemini (made by Google) is ideal if you already use Gmail, Google Docs, Google Calendar or Google Drive. It connects directly into those tools, which means it can read your emails and documents and help you work with them. Gemini Advanced costs around £19 a month.

TIP: Head to gemini.google.com — you may already have access if you use a Google account.

Choose Copilot if Your Business Runs on Microsoft

04

If Word, Excel, Outlook and Teams are your daily tools, Microsoft Copilot sits inside all of them. It can draft emails, summarise meetings, tidy up spreadsheets and more — all without leaving the apps you already use. It's worth exploring if you pay for Microsoft 365.

TIP: Check if Copilot is already included in your Microsoft 365 subscription before paying extra.

Turn On the Right Settings Before You Start

05

Before your first proper conversation, spend two minutes on these key settings. In Claude: go to Settings and turn on Memory — this lets Claude start remembering things about you over time. In Gemini: make sure you're signed into your Google account so it can connect to your Drive and Gmail. In both tools, have a look at the Extensions or Integrations settings to see what apps you can connect.

TIP: In Claude, go to Settings > Memory and switch it on. It's off by default and makes a big difference.

Teaching your AI everything about you and your business

An AI tool that knows nothing about you is about as useful as asking a stranger for business advice. This phase is about giving it the full picture — who you are, what you do, who you serve and how you like to work. Once it knows you, everything gets better.

Let the AI Interview You

06

The easiest way to set up your memory is to ask the AI to interview you. Type this: "I want you to ask me questions — one at a time — so you can learn everything about me and my business. Once you know enough, I'd like you to write a summary I can save and use with you going forward." Then just answer each question out loud or in writing.

TIP: Do this in a relaxed way — it's a conversation, not a form to fill in. Take your time.

Make Sure It Knows the Important Stuff

07

As it asks you questions, make sure you cover: your business name and what you do, who your ideal customers are, what problems you solve for them, your goals for the next year, your biggest current challenge, and how you like to communicate (formal or relaxed, short or detailed).

TIP: Don't worry if you go off on a tangent — that context is often the most useful information.

Save Your Business Summary

08

Once the AI has asked its questions and written your summary, copy that summary and save it somewhere safe — a Notes app, Google Doc or Word document. This is your "Business Context" — a snapshot of everything the AI needs to know about you.

TIP: Give the document a clear name like 'My AI Business Context' so you can find it easily.

Paste It at the Start of Every New Chat

09

AI tools don't automatically remember previous conversations (unless you use Claude's Memory feature or set up a Project/Notebook). So get into the habit of pasting your Business Context at the start of any new chat. It only takes a few seconds and makes a huge difference to the quality of the help you get.

TIP: In Claude, you can turn on Memory in Settings so it starts to remember you automatically over time.

Update It as Your Business Changes

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Your Business Context isn't a one-off exercise — it's a living document. Every few months, or whenever something significant changes in your business, update it. New service? New target customer? New goal? Add it in. The more current it is, the more useful your AI becomes.

TIP: Set a reminder every 90 days to review and refresh your Business Context document.

Claude calls them Projects. Gemini calls them Notebooks. Same idea.

Once you're comfortable having conversations with your AI, the next step is to organise those conversations into dedicated workspaces. Think of each one as a separate filing cabinet — so your marketing chat doesn't get mixed up with your finances, and your big thinking stays separate from your day-to-day tasks.

Understand What Projects and Notebooks Are

11

In Claude, these are called Projects. In Gemini, they're called Notebooks. In both cases, the idea is the same — a dedicated space where the AI remembers everything you've discussed on that topic. You can upload documents, save instructions, and have ongoing conversations that build on each other over time.

TIP: Claude Projects: go to the left-hand menu and click 'New Project'. Gemini Notebooks: find it in the left menu under 'Notebooks'.

Set Up Your Thought Partner Workspace

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Create a Project or Notebook called 'Thought Partner'. This is your personal sounding board — the place where you think out loud, work through decisions, challenge your own ideas and get honest feedback. Paste your Business Context in here as the starting instructions so it always knows who it's talking to.

TIP: Start every session here with: "I want to think through something — can you help me work it out?"

Set Up Workspaces for Your Key Business Areas

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Create separate Projects or Notebooks for: Business Growth (strategy, goals, new ideas), Operations (how the business runs day to day), Finance (budgets, pricing, costs), Marketing (content, campaigns, messaging) and Research (anything you need to investigate or understand better).

TIP: You don't need to use them all at once. Set them up, then dip into them as the need arises.

Let AI Help You Write the Instructions for Each Workspace

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Once your Business Context is saved (from Phase 2), use it to write the instructions for each workspace. Paste your Business Context into a new chat, then use this prompt: "Based on everything you know about my business, please write a set of instructions for a [Marketing / Finance / Operations / Research / Business Growth] workspace. The instructions should tell the AI what this space is for, what tone to use, and what kinds of tasks I'll be bringing to it. Keep it short, practical and in plain English." Do this for each workspace and paste the result into the instructions field of that Project or Notebook.

TIP: This turns your Business Context into tailored instructions for every workspace automatically — no guessing.

Using your worksheet to find the quick wins that make a real difference

You've already done the hard thinking in your workbook — you know what eats your time, what you keep putting off, and what you'd love to do more of. Now we turn that into action. Your first three AI wins come directly from what you wrote down.

Look at Your Repeating Tasks List

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Go back to Section 2 of your workbook — the tasks you do on repeat. Pick the one that takes the most time or happens most often. That's your first AI candidate. Take it to your AI tool and describe it. Ask: "I need to do [task] regularly. Can you help me create a template or system for this?"

TIP: If a task involves writing, thinking, planning or explaining — AI can almost certainly help with it.

Pick Your First Win — Something You Write Regularly

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Choose one piece of writing from your repeating tasks — a type of email, a social post, a quote template. Take it to your AI and say: "I need to write a [type of thing]. Here's the context: [give the details]." See what it produces. Tweak it. Use it. Save the prompt. That's your first win.

TIP: Save the prompt that worked well. You'll use it again next time — it gets faster and better each time.

Pick Your Second Win — From Your 'Putting Off' List

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Look at Section 3 of your workbook — the things you keep putting off. Pick one. Take it to your Thought Partner workspace and say: "I've been putting off [X]. Can you help me think through why, and what the first step might be?" You'll be amazed what shifts when you just start talking it through.

TIP: AI is brilliant at helping you structure your thinking. You don't need all the answers — just start talking.

Pick Your Third Win — From Your 'Love to Do More' List

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Look at Section 4 of your workbook — the things you'd love to do more of. Pick one. Ask your Thought Partner: "I'd love to do more of [X] in my business. What's stopping me and what could AI do to make this easier?" This is often the most energising conversation of the whole session.

TIP: This is the one that reminds you why you're doing this. The ambitious stuff matters just as much as the grind.

Build a Simple Daily Habit Around Your 3 Wins

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Now that you've found your three wins, make them a regular part of your working week. Even 15 minutes a day using AI for these specific tasks will compound quickly. Within a few weeks, you'll find yourself reaching for it naturally — and spotting new ways it can help without even trying.

TIP: The goal isn't to use AI as much as possible. It's to use it consistently for the right things.

The skill that unlocks everything else

Prompting is just the word for how you talk to an AI. And like all communication, the clearer and more specific you are, the better the response you'll get. This isn't a technical skill — it's a communication skill. You already have the basics. These five steps will sharpen them.

Give It Context Before You Give It a Task

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The single biggest improvement you can make to any AI response is to give context before you ask for something. Instead of "Write me a social media post", try "I run a small bookkeeping firm in Southport. My clients are tradespeople who hate admin. Write me a friendly LinkedIn post about why getting on top of your expenses early saves money at tax time." Night and day difference.

TIP: Think of it like briefing someone on their first day. The more they know, the better they'll do.

Tell It What You Want the Output to Look Like

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Be specific about what you want back. How long should it be? What tone? What format? For example: "Write this as a short, friendly email — no more than three short paragraphs, conversational tone, no jargon." The more you specify the shape of the answer, the closer it'll be to what you actually need.

TIP: If you're not sure what format you want, ask it to suggest one: "What's the best format for this?"

Don't Accept the First Draft — Ask It to Improve

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The first response is rarely the final answer — and that's fine. Think of it as a first draft. Ask it to tweak: "Can you make this shorter?" or "Make it sound a bit warmer" or "The second paragraph is too formal — can you loosen it up?" Keep going until it's right. This is normal and expected — not a failure.

TIP: Prompting is a conversation. The best result usually comes after two or three rounds of back and forth.

Use the RICE Method for Important Tasks

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For anything important, structure your prompt using RICE: Role (tell it who to be — "Act as a marketing consultant"), Input (give it the information it needs), Context (explain why you need this), Expected Output (describe what you want back). You don't always need all four, but having them in mind helps you write much better prompts.

TIP: Example: "Acting as a marketing consultant [R], here's my latest service offer [I], I'm pitching to local builders [C], write me a punchy three-sentence intro for a sales email [E]."

Build a Personal Prompt Library

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Every time you write a prompt that gets you a brilliant result, save it. Keep a simple document — in Notes, Google Docs or Word — with your best prompts organised by topic. Over time, this becomes one of the most valuable tools in your business. Instead of starting from scratch each time, you pick up a proven prompt and go.

TIP: Start with five: one for emails, one for social posts, one for thinking things through, one for research and one for writing proposals or quotes.

Let's Plan Your AI Journey

Fill this in during your session — there are no wrong answers.

1. Pick Your 3 Starter Workspaces (Projects / Notebooks)

We'll talk through the options together. Circle three that feel most useful for your business right now.

Workspace 1	Workspace 2	Workspace 3
Name: _____	Name: _____	Name: _____
I'll use it for: _____	I'll use it for: _____	I'll use it for: _____
_____	_____	_____

2. Tasks I Do on Repeat

Write down anything you do regularly that feels like a grind — could AI do this for you?

3. Things I Keep Putting Off

For your Thought Partner conversations.

4. Things I'd Love to Do More Of

Big ambitions or neglected ideas.

My Session Notes

Jot down anything that strikes you — ideas, questions, things you want to remember.

■ Key Things I Learned Today

■ Things I Want to Try This Week

■ Ideas I Want to Come Back To

My Questions

Write down anything you want to ask — on the day or on a follow-up Zoom with Phil.



■ Questions for Phil — On the Day

■ Questions for My Follow-Up Zoom Call

■ Things I Want Phil to Help Me Set Up

My Commitments

What are you taking away from today? Write it down — it makes it real.

■ I Will Do This Before the End of the Week

■ I Will Set Up These Workspaces First

■ My First 3 AI Wins Will Be

■ I Will Come Back to AI Academy For

YOUR AI SET UP CHECKLIST



Tick each step off as you complete it. Progress is the goal.

☐ 01 Understand What These Tools Actually Are	☐ 14 Let AI Help You Write the Instructions for Each Workspace
☐ 02 Choose Claude if You Want the Best Thinking Partner	☐ 15 Upload Useful Documents to Each Workspace
☐ 03 Choose Gemini if You're Deep in Google	☐ 16 Look at Your Repeating Tasks List
☐ 04 Choose Copilot if Your Business Runs on Microsoft	☐ 17 Pick Your First Win — Something You Write Regularly
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Feeling Overwhelmed? Don't Be — That's Exactly What We're Here For.

Book a 2-hour 1-2-1 session — just you, your business, and a coffee.
We'll sit down together, work through every step and get you perfectly set up.
You'll leave with everything in place, real confidence, and probably a great laugh too.

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