

Dive into AI Integration: Empowering Business Counselors

Friday, 8:30 a.m.



Welcome!



Hayley Swinson-White
Communications Specialist



Lindsay Hinger
Launch Specialist



Kate Statz
Online Learning Specialist



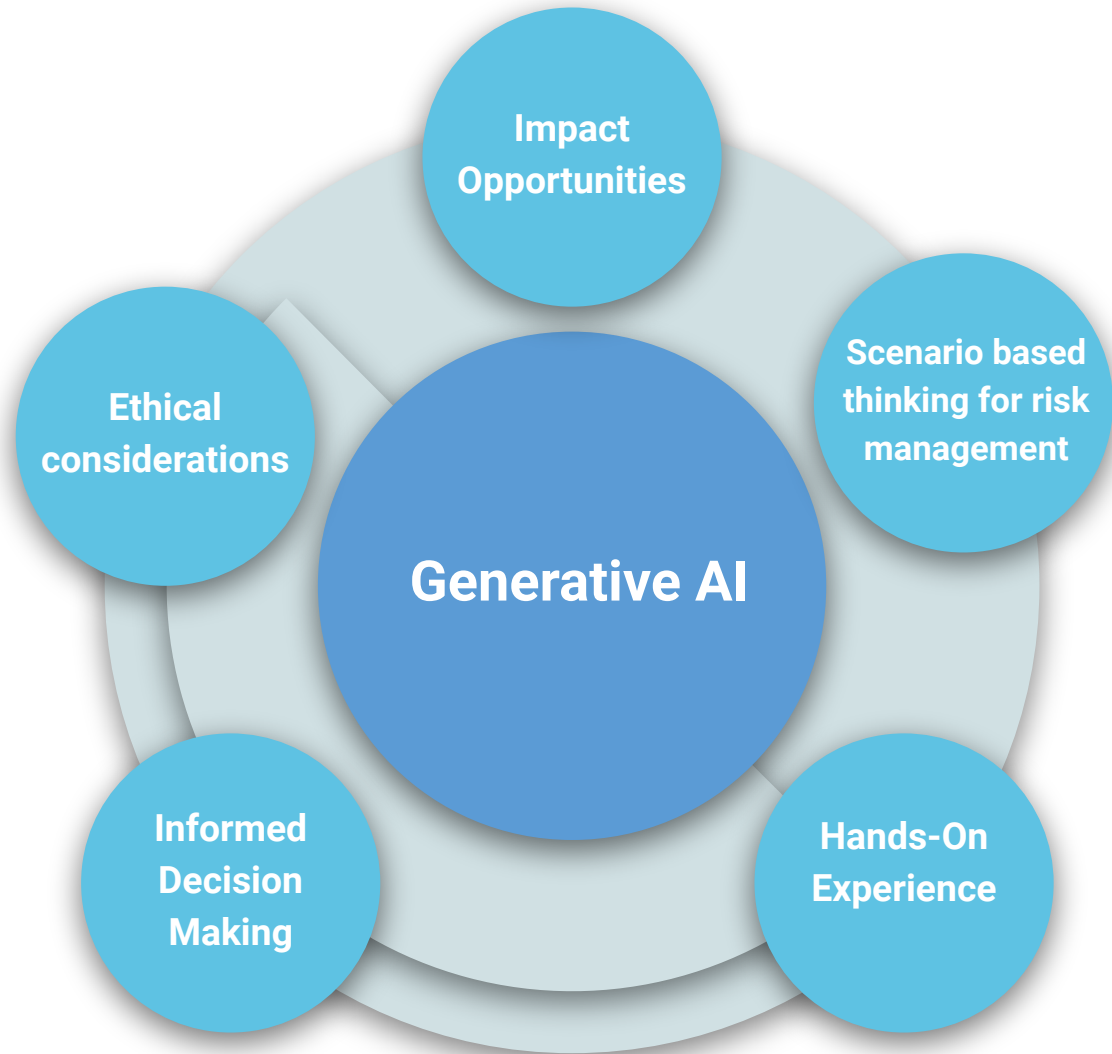
Rachel Bridgers
General Business Counselor



Shelley Kelly
General Business Counselor
befunky.com



What to expect for today



From the 50s to today



- **1956: AI Proved Theorems at Carnegie Mellon University**
- **1966:** ELIZA, the first chatbot, is created.
- **1997:** AI computer Deep Blue beats world chess champion Garry Kasparov.
- **2011: IBM's Watson wins on *Jeopardy!***, showing AI can understand questions.
- **2015: Generative AI** starts creating images and data with new techniques.
- **2022:** ChatGPT launched, a chatbot using human supervised learning
- **2023:** Google Gemini launched as a large language model, using human-supervised learning.



What's Next?

“Possibly, the next step is ‘Interactive AI,’ which means bots that don’t just chat but can carry out all sorts of tasks by delegating to other software and even people to get stuff done for you.”

DeepMind cofounder Mustafa Suyleman

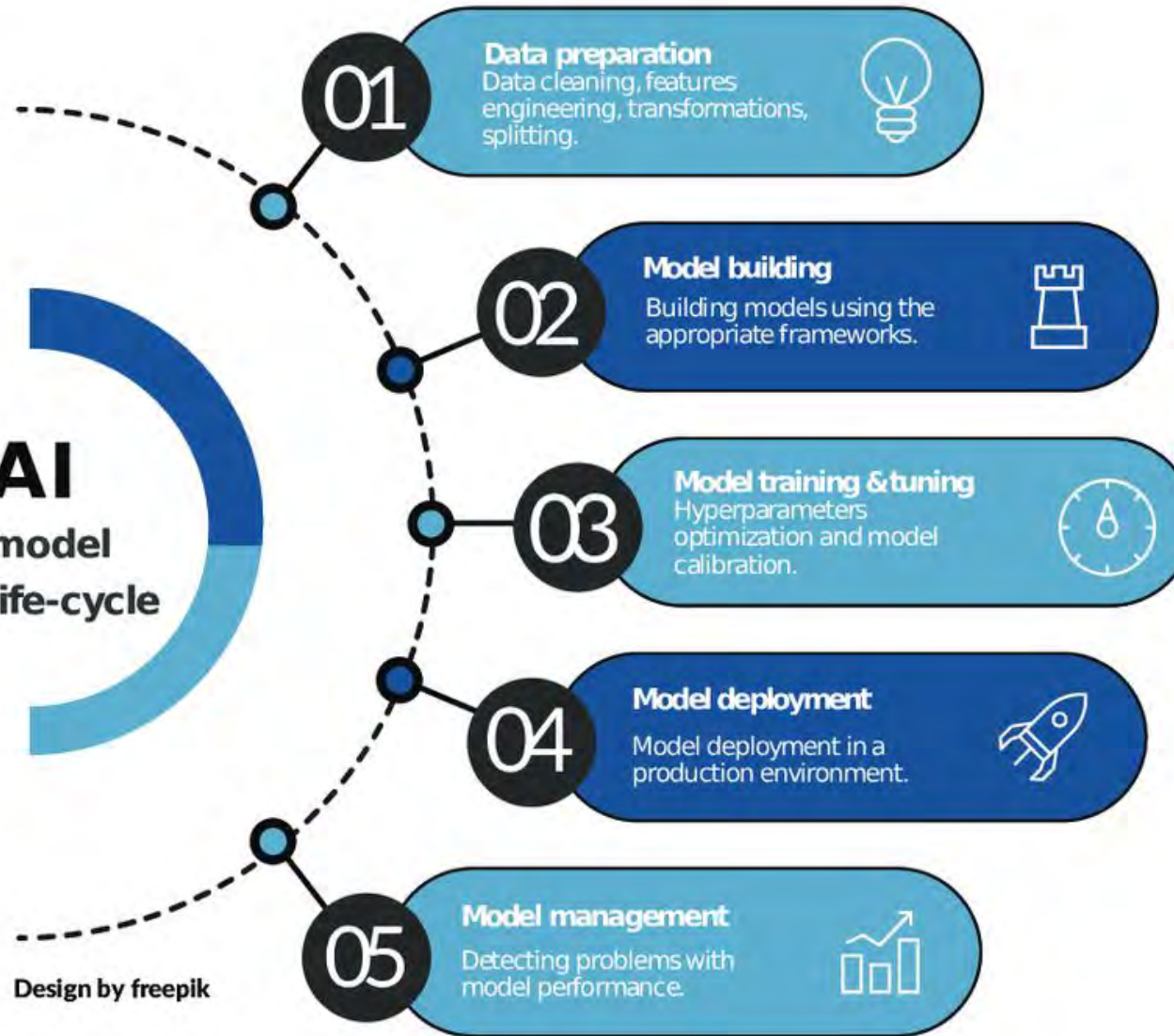


AI and Machine Learning

- Machine learning is a subset of AI focused on developing computer programs (AKA algorithms) that analyze data to make decisions or predictions.
- Large Language Models (LLMs) like ChatGPT and Google Gemini use machine learning.
- While LLMs can produce text that is often indistinguishable from human-generated content, they are still tools that are controlled by human input and limited by their last training set.



AI model life-cycle



Design by freepik

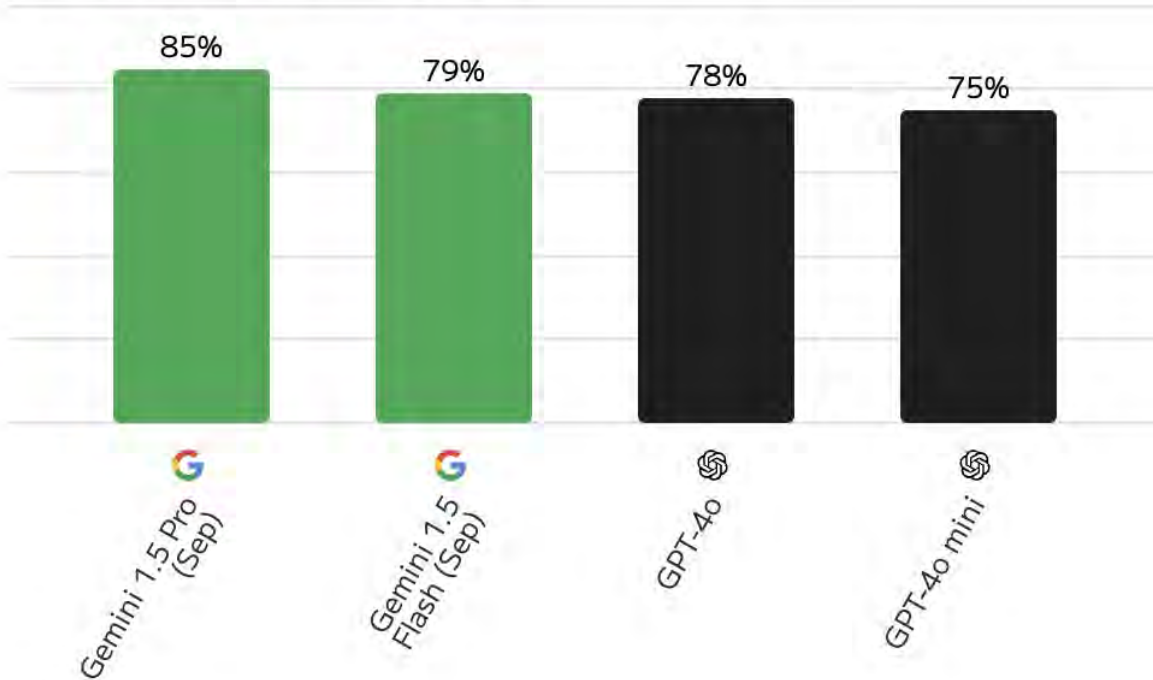




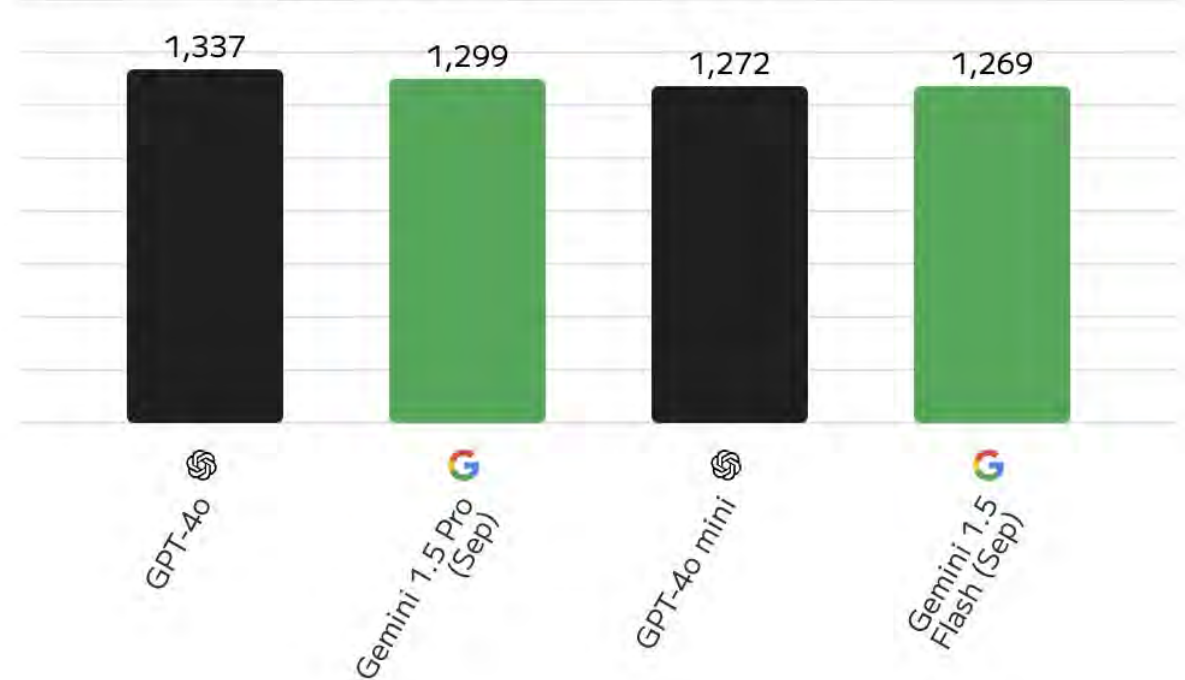
How Dataset and Algorithm Affect Capability

Evaluation results measured independently by Artificial Analysis; Higher is better

Quantitative Reasoning (MATH)



Communication (LMSys Chatbot Arena ELO Score)



GPT-4o: “Common Crawl” dataset; billions of web pages; improved model

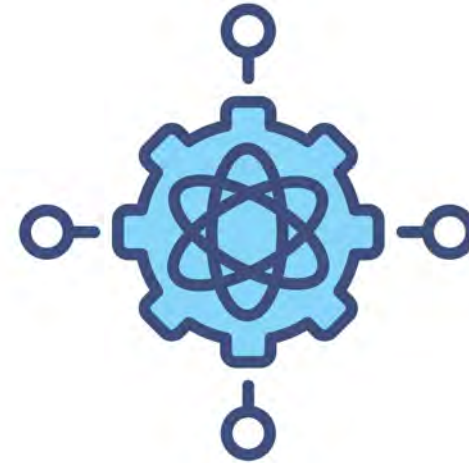
Gemini 1.5 Pro: multimodal mixture-of-experts (MoE) approach



AI is dependent on two things:



Data Set



Algorithm

How does the AI structure affect its limitations?

- Basic AI models cannot use reason, they can only predict.
- Lacks human creativity.
- Lacks moral and ethical reasoning.
- Dependent on quality and quantity of data.
- Requires significant resources to operate.
- Must be maintained and updated regularly.



What's the Difference?



“Just Googling It”

- Searches through existing web content
- Shows multiple sources/links
- Need to click, read, and synthesize yourself

Better for:

- finding specific facts, original sources
- Constantly updated



“LLMs” such as ChatGPT and Gemini

- Provides synthesized, conversational response
- Gives direct answers rather than links
- Combines information into cohesive explanations
- Limited to training data cutoff date

Better for:

- Analyzing complex topics
- Getting explanations in simple conversational terms
- Brainstorming ideas
- Writing assistance
- Problem-solving



Is Someone Hallucinating??

Current language models can produce false outputs unverified by evidence, a problem known as “hallucinations.”

Newer language models generate more accurate responses with fewer hallucinations are more trustworthy and can be used in a broader range of applications are coming.

- Provide very clear prompts
- Always verify content and resources
- Use human judgment



Check AI Sources

1

Help me understand how to ethically gather and use competitive intelligence in our decision-making

Ethically gathering and using competitive intelligence (CI) is crucial for strategic decision-making while maintaining integrity and avoiding legal or reputational risks. Here are some key principles and approaches:

1. Gathering Competitive Intelligence Ethically:

- **Public Sources:** Start with publicly available information such as competitors' websites, social media, annual reports, press releases, news articles, and industry publications. This is typically the safest and most ethical way to gather insights.
- **Industry Reports:** Use reputable market research firms to get reports that summarize industry trends, competitor performance, and other strategic insights.
- **Customer and Supplier Insights:** Obtain insights through conversations with your own customers, suppliers, or industry partners. These sources may provide indirect information about competitors' activities.
- **Attend Industry Events:** Conferences, trade shows, and webinars can be great opportunities to learn about competitors through observation, networking, and direct conversations.
- **Job Postings:** Reviewing competitors' job postings can give you clues about their expansion plans, technologies they are using, and projects they are focusing on.

2

What sources did you use for your response?

The response I provided drew from my general understanding and training based on a diverse set of sources available in my training data, which includes the following types of materials:

1. **Business Literature:** Competitive intelligence (CI) practices, especially those emphasizing ethical standards, are commonly covered in business literature and textbooks. Some of the specific books mentioned, such as those by Larry Kahaner and Michael Porter, are well-known resources in the field of competitive analysis and strategic management.
2. **Industry Best Practices from SCIP:** The **Strategic and Competitive Intelligence Professionals (SCIP)** association is recognized for setting ethical standards for CI professionals. My response includes the general principles advocated by SCIP, which are part of my training.
3. **Harvard Business Review (HBR) and MIT Sloan Management Review:** These publications are frequently referenced for their authoritative articles on ethical business strategies, competitive intelligence, and general strategic frameworks. I mentioned them because they are prominent sources for case studies and examples of CI best practices.
4. **Business School Curricula:** The practices I outlined are aligned with general ethical frameworks taught in many MBA programs. Schools like **Harvard Business School** and **Wharton** often use real-world case studies that emphasize ethical competitive intelligence gathering.
5. **Federal Trade Commission (FTC) Guidelines:** My knowledge base includes references to regulatory standards like those of the FTC, which provide guidance on avoiding unfair competition.
6. **Legal Guidelines and Journals:** Basic principles around respecting intellectual property, confidentiality, and compliance with data regulations come from common legal knowledge, as well as journals like the **Journal of Business Ethics** and the **Journal of Competitive Intelligence and Management**.



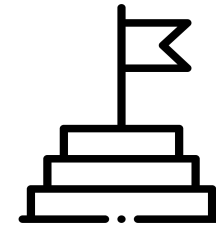
Writing Effective Prompts



Be Specific



Provide Context



Clarify Goals





Be Specific

Original:

“Generate a list of theme ideas for a conference.”

Better:

“Generate a list of theme ideas for a professional conference on customer experience in the hospitality industry.”





Be Specific

Original:

“Summarize this article for me.”

Better:

“In a **bulleted list**, summarize the **top five main points** of this article.”





Context is Key

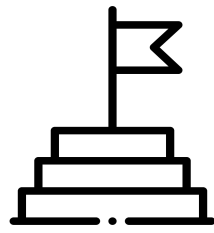
Original:

“Improve this paragraph.”

Better:

“I am working on a Facebook post for an event called XYZ. The audience is small business owners looking to learn about government contracting. With that context, can you improve this paragraph, including a good hook, a call-to-action, and clear information about the event?”





Clarify Goals

Original:

“I want to grow my business. What should I do?”

Better:

“I own a small **landscaping business** that serves **residential clients** in suburban neighborhoods. My **revenue has plateaued**, and I’d like to grow by **offering services to commercial clients**, but I’m unsure where to start. Can you help me **identify steps to pivot** toward this market, including marketing strategies and operational adjustments?”



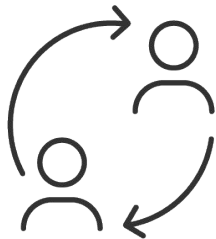
Advanced Options



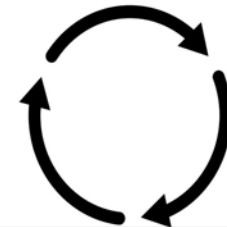
Attach a File



Use Examples



“Act as if . . .”



Iterate, iterate, iterate





Attach a File

Prompt:

Here are some **examples of outlines** that I like **(see attachments)**. Can you **help me draft an outline** for a presentation on the power of storytelling in business **based on these formats**? I'm looking for something that captures a **similar structure and flow**, with sections on key principles, practical applications, and examples.





Use Examples

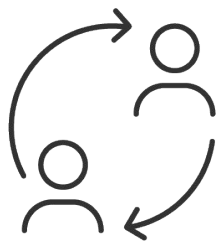
Prompt:

I am trying to come up with a theme for a professional conference for small business counselors in North Carolina. The conference will be held in a coastal location.

Use these titles of past conferences as a reference:

- 1) Prepping the Pit Crew
- 2) Charting New Horizons



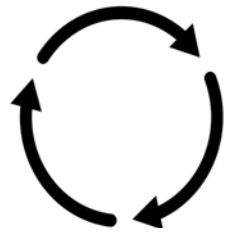


“Act as if ...”

Prompt:

Act as a small business counselor advising a startup bakery looking to expand its operations. The bakery currently has a loyal local customer base and wants to explore online sales and regional delivery. **Provide a step-by-step strategy** for transitioning into e-commerce, **including** platform selection, marketing strategies, and operational considerations like shipping logistics and maintaining product quality.





If at first you don't succeed...

- Even a good prompt may need some refinement.
- Rephrase or refine your request in the same chat window that you started in.
- For new, unrelated questions/topics, start a new chat.





ChatGPT 4o



ChatGPT



Explore GPTs

Yesterday

Business Disaster Recovery

Previous 7 Days

Business Title Optimization

Good Morning Bits

Sidebar Chat Visibility Issue

Previous 30 Days

Marketing Group Name Ideas

Internal Marketing Training Top

Research Report Summary Edit

September

GovCon Webinar Series Overvi

August

Branding Best Practices

What can I help with?

Message ChatGPT



Create image



Code



Summarize text



Analyze data



Help me write

More



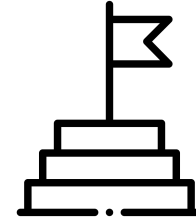
Writing Effective Prompts



Be Specific



Provide Context



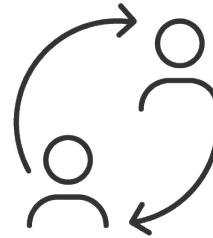
Clarify Goals



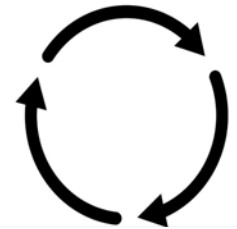
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Use Examples



“Act as if . . .”

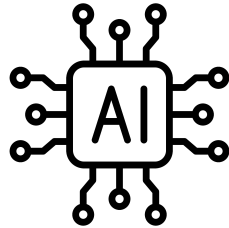


Iterate, iterate, iterate



AI for Small Business Counseling

Overview & Key Benefits



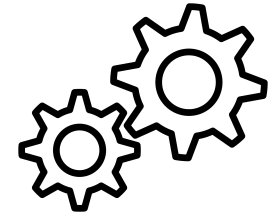
Growing AI Adoption

98% of small businesses use AI tools, with 91% citing growth potential from AI integration.



Efficiency and Cost Savings

60% of businesses save hours weekly; averaging over \$35,000 in annual savings, or 15-30% in cost reduction in the first year.



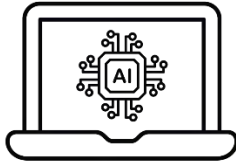
Enhanced Client Services

AI tools enable data-driven support, reduce repetitive tasks, and create greater value from counseling.



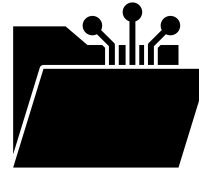
AI Tools for Daily Counseling Tasks

Meeting Support, Documentation, and Client Engagement



Meeting Automation

AI tools assist with note-taking, summarizing meetings, and generating action items.



Efficient Document Creation

Automatically draft emails, agendas, and follow-ups to save time and enhance quality.



Client Engagement Insights

Use AI to personalize client materials, create tutorials, research, prep for meetings, and simplify complex information.



Specialized AI Tools for Counselors

Tools for Notes, Design, and Calendar Management



Automated Note taking:

Tools like and Zoom AI, Otter.ai, Sybill, Notion, OneNote, and other apps capture and transcribe meeting details accurately.



Design Assistance:

Canva offers design templates for creating presentations, handouts, and social media graphics.



Calendar Management:

AI tools like Calendly, Bookings, Reclaim.ai, and in-CRM tools automate smart meeting scheduling and client reminders.



How-To Video

- AI Companion inside Zoom
- Where to find your Meeting Notes
- Use AI to reformat your notes into the required format for your CRM
- Use AI to write a follow-up note to your client



zoom.us/profile?amp_device_id=714bab79-2533-498c-a840-9971d5c80a15

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When you join meetings, webinars, chats or channels hosted on Zoom, your profile information, including your name and profile picture, may be visible to other participants or members. Your name and email address will also be visible to the account owner and host when you join meetings, webinars, chats or channels on their account while you're signed in. The account owner and others in the meeting, webinar, chat or channel can share this information with apps and others.



Shelley Kelly

Shelley Kelly

DepartmentSBTDC - Capital Center

Edit

Personal

Phone

Not set

Add Phone Number

My direct chat link

https://ncsu.zoom.us/launch/chat?src=direct_chat_link&email=sskelly3@ncsu.edu

Copy

Language

English

Edit🗨

For GBC Skelly:

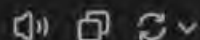
1. Text Client upon leaving her prior meeting on November 26th to confirm arrival time.
2. Evaluate Client's potential in advisory and technology commercialization roles and prepare feedback for the next meeting.

For Acquirer:

1. Develop business development ideas to present during the November 26th meeting.

Follow-Up Actions:

- GBC Skelly and Client to discuss outcomes of the meeting with Acquirer and their readiness to proceed.
- Client to report updates on SBA financing contingencies and business sale progress.
- Schedule a follow-up meeting post-November 26th to review implementation of discussed ideas and assess progress on business transitions.

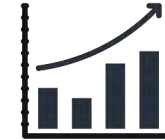


AI for Small Businesses



Marketing & Sales

AI generates all types of content, enhances SEO, and supports customer engagement.



Operations & Administration

Automates SOPs, employee handbooks, and process documentation for consistent quality.



Financial Management

Tools for budget planning, cash flow tracking, and invoice management increase accuracy and efficiency.



Human Resources

Streamlines onboarding, professional development, and performance review documentation.



AI in Action!

Situation:

Your client who owns a pest control company has finally sent you their business plan! They have asked for you to review the plan and provide your feedback.

- Use AI to help you assess the plan.
- Based on the feedback AI provides, you can use AI to dig deeper for a few additional ideas and recommendations you can share with your client. (Showing greater value and support!)



Why it matters:

Shows greater value, proactive engagement, and new opportunities to counsel and help them improve their business!



ChatGPT

What can I help with?

 Message ChatGPT 

- Create image
- Help me write
- Brainstorm
- Summarize text
- More

AI in Action!

Situation:

The same pest control client is trying to grow market share and has asked for industry research that may inform new market strategies for their business.

- Use AI to review industry reports and provide ideas based on your client's business plan.
- Deliver the ideas you feel are a fit to the client and have a follow-on session to discuss implementation.

Why it matters:

Shows value, your deeper understanding of their business, and creates new opportunities for counseling and helping them grow!



- **Cost-Effectiveness:** Housecall Pro is known for being budget-friendly, with plans starting at around \$49/month, making it ideal for small pest control companies.

Recommendation:

For a **small to medium pest control company**, **Jobber** and **Housecall Pro** provide robust functionality at an affordable price, especially if high-touch service and mobile access are essential. **PestPac** or **ServiceTitan** are strong options for a **larger operation** with specialized pest control needs, especially if the company anticipates expansion and requires a highly proactive, automated CRM.

Great! Thank you.



You're very welcome! I'm glad the recommendations were helpful. If you need further assistance with CRM setup, training ideas for your client's team, or anything else to help them stand out in the pest control industry, just let me know. Good luck to your client!



AI in Action!

Situation:

Your client is trying to grow their business consulting company and is having trouble identifying buyer personas for the unique consulting services they offer. They have come to you to help them with this challenge.

- Use AI to review industry reports and the client's business plan to jump start defining their unique buyer personas.
- Use AI to create tailored social media posts for each buyer persona.

Why it matters:

Sometimes the client is too close to the business to be able to see exactly who their buyer is. AI can generate ideas you can share with your client and see if they resonate (or not).



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More

AI in Action!

Situation:

Your business consulting client is getting set up on SAM and needs a good capabilities statement.

- Use AI to help create a first draft with them. Demonstrate this on a zoom call so you're teaching them how to use AI also.
- Use the AI-generated draft and edit it, make it even better.

Why it matters:

Be the counselor giving the client new tools to make their work better, faster, and easier. The faster they get on that site, the faster they may win a new government contract opportunity!



What can I help with?

Message ChatGPT



- Create image
- Make a plan
- Get advice
- Summarize text
- More

Break

10:00



Assessing AI Readiness

- Have you ever tried using AI? If so, which ones and for what purpose? Can you name three AI tools you've heard of or used? Can you name three content or graphics AI tools you've heard of or used?
- About how many times are you using AI weekly?
- After entering a first prompt, about how many time do you ask the AI for revisions or additional information? In one sentence, where would the first area of your business that comes to mind for using AI on a regular basis?
- Have you used AI in any area of finance?
- What social media are you currently on (both B2B and B2C) and have you used AI to support your social media program?
- Do you use AI automation anywhere in your business?
- Have you created videos using AI?

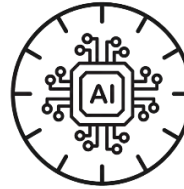


Best Practices for AI Use in Counseling



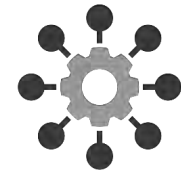
Privacy & Security

Ensure client confidentiality; sanitize data and review tool policies.



Efficiency Tips

Create reusable templates, streamline documentation, time management, save successful prompts, and maintain organized output.



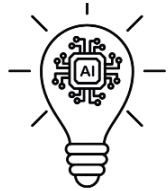
Quality Control

Verify AI outputs and retain oversight to ensure accuracy and professional standards. Human in the loop always.



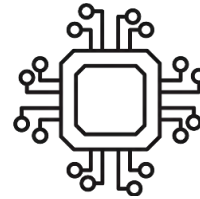
Implementation Guide for AI in Counseling

Getting Started and Key Considerations



Start Small

Master one or two tools first to gradually build AI proficiency.



Create Standard Processes

Document effective workflows and save reusable templates and prompts.



Monitor ROI

Track time, evaluate fit and efficiencies created.

Bottom line - read the fine print when using AI, don't use client names or confidential information, and always make sure there's a "human in the loop."



Role Play – AI Readiness Assessment

In this 5-min video, we'll use the AI Assessment as a guide in a zoom call with the owner of a Catering Company to discover their:

- Knowledge of AI
- Experience using it
- Willingness to use it in their business.

This helps the counselor know how to proceed in using AI with the client.

Actors:

Lindsay Hinger, as Counselor

Rachel Bridgers, as Client, Owner of a Catering Company

5-min video demo





Lindsay Hinger - SBTDC

Role Play – AI in Business Plan Creation

This 7-min video demonstrates a counselor using AI during a zoom session with the owner of a Specialty Spa to help them write a business plan.

- Starting with the client's completed Lean Canvas Model
- Use AI to show the client how to develop sections of their business plan
- Demonstrate the importance of taking one step at a time to make sure the AI output aligns with the client's vision for every part of their business.

Actors:

Lindsay Hinger, as Counselor

Rachel Bridgers, as Client, Owner of a ASMR Spa Business

[7-min video demo](#)





Lindsay Hinger - SBTDC

Let's Practice!

- Use your laptop
- Open your preferred LLM (ChatGPT, Gemini, Claude, etc.) and login.
- Start a new chat.
- We'll present 5 scenarios, one at a time, and you'll practice using AI with each scenario.
- Don't be afraid to iterate.
- After each practice, we'll ask 1-2 people to share what they experienced.



Scenario #1 – Draft Email

Pick a brand you know well or enjoy yourself. Now, act as a salesperson for that brand.

Generate an Email Draft:

- **Prompt:** "Write a professional email to a [potential client] introducing [my services] and highlighting how I can help their business." Include more details about how you're different, their pain points, tone of voice, and brand to give it a more personal feel.
- **Iterate:** Ask AI to personalize the email further, adding specific details about the client, their business, recent contact, adjust tone of voice, etc.
- **Observations:** What did you notice, experience, or learn about AI during this experiment?

3 Minutes



Scenario #2 – Generate Marketing Content

Think of a consumer brand you love. Use AI to write a social media post promoting the product.

Generate Marketing Content:

- **Prompt:** "Write a social media post promoting a [product/service] with a focus on [desired emotion/benefit/value]."
- **Iterate:** Try iterating the response by asking for the post to be written with a specific brand/voice.
- **Observations:** What did you notice, experience, or learn about AI during this experiment?

3 Minutes



Scenario #3 – Business Plan

15 Minutes

Client Name: Rolling Roots Food Truck

Business Concept: Rolling Roots is a plant-based food truck dedicated to creating unique, vibrant, and healthy dishes using locally-sourced, seasonal ingredients. Offers a rotating menu of bowls, wraps, and fresh smoothies, with a focus on vegan and gluten-free. Mission is to bring healthy, accessible, and delicious meals to on-the-go customers, targeting health-conscious consumers and foodies looking for fresh, sustainable choices in fast food.

Generating Business Plan:

- **Prompt:** "Write a business plan for my company, Rolling Roots Food Truck. business concept].
- **Resources:** Use your own Business Plan Template or access ours online by scanning the QR code. After scanning the code, you can email the document to yourself & download it as a PDF.
- **Iterate:** Use the additional information in your folder about the business's unique needs and goals to develop a framework for the plan that you can share with a client as a starting point.
- **Observations:** What did you notice, experience, or learn about AI during this experiment?



Wrap Up – What You’ve Learned Today

- What AI is and how it works
- Value and the risks
- Ways you can use it daily
- Best practices
- Ways you can use it with clients
- Tools
 - AI Readiness Assessment
 - AI for Small Business Handout
 - Scenarios to practice with
- You’ve practiced using it - so keep doing that!
- Keep learning – list of learning sources on the last page of your handout

You don’t need to be an expert at AI to talk about it with clients. Our job is to provide clients with resources that may help their businesses be better. AI is just one more tool in our toolbox. Now you can add it to yours!

