



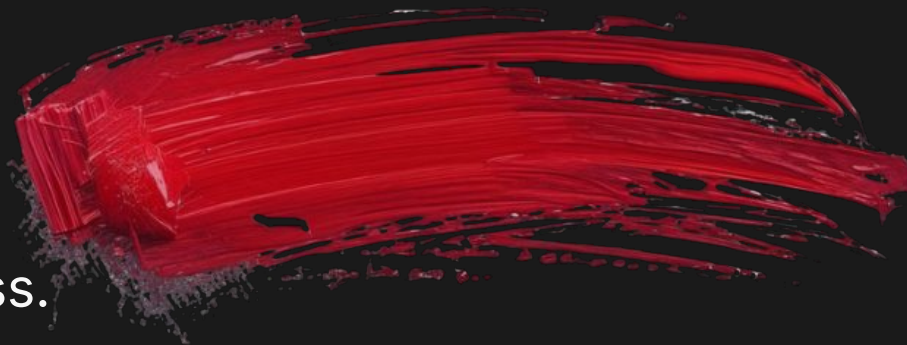
MASTERMINDS AI WORKSHOP SERIES · SESSION 1

AI Assessment

Where do I even start? Find where AI fits in your business.

Ashley Canada + Eric Canada · Blane Canada

Thursday, October 8, 2026 · 8:00am ET (7:00am CT)



IN PARTNERSHIP WITH





Ashley and Eric Canada



Ashley Canada

Co-Founder and AI Implementation Lead

Ashley went from zero coding experience to building AI systems, including one that cut an 80-hour process to under an hour. She finished in the top 10 of 160 in a 2026 global AI coding hackathon.



Eric Canada

Co-Founder and Chief Strategy Officer

Nearly 30 years in tech. Built, grew, and sold a software product used by organizations across the US and Canada.

Together they've taught practical AI to business leaders from Wyoming to Pennsylvania, Louisiana and New Mexico, and on national economic development stages. Eric has taught marketing across the US and Canada for 25 years.

How today works



Ask anytime

Type questions in the chat. One of us is always watching it.

Best on a computer

Open ChatGPT, Claude or Copilot in another window. On a phone? Listen, screenshot, run the prompts tonight.

Grab a pen & paper

You'll write down 3 picks today that you'll use in our live exercise.

Screenshot the red labels

Slides marked **SCREENSHOT THIS** have the prompts and lines you'll use later. Save them in one folder.

IN THE CHAT

1. How confident are you using generative AI in your work today?

Type a number from 1 to 10 in the chat.

2. What is one thing you hope to walk away with?

TODAY'S GOAL:

More clarity than you had yesterday, and more confidence to take your next step with AI.

WHAT YOU'LL LEARN

1. Where AI fits in your work: How to spot the tasks worth handing off
2. How to ask AI well: And how to check what it gives you back
3. Your first step: One task to try, and when

Most people talk to AI like it's Google

TRUE STORY



Like Google

Do an analysis of my website and compare to three of my top competitors.

With the ingredients

Act as an expert marketing strategist for small businesses. I run mybusiness.com, a 12-person service company in [town], and I want more local customers. Search the web and find my top 3 local competitors. Show me their links and why you picked them. Then build a table comparing us: services, reviews, calls to action, what's missing. Example row: "Reviews · us: 12 on Google · them: 85, they ask after every job." Give me my top 3 fixes, ranked. Think it through first. Use only what you find. If you're not sure, say so.

The AI Fluency Framework

SCREENSHOT THIS



- I Delegation**
Setting goals and deciding whether, when and how to engage with AI.
- 2 Description**
Effectively describing goals to prompt useful AI behaviors and outputs.
- 3 Discernment**
Accurately assessing the usefulness of AI outputs and behaviors.
- 4 Diligence**
Taking responsibility for what we do with AI and how we do it.

Source: Anthropic, "AI Fluency: Framework & Foundations" (2025).

Delegation

Setting goals and deciding whether, when and how to engage with AI.

Pick the tasks AI can help with.

Pick ONE business function to target with AI today

WRITE IT DOWN



Pick the one that's costing you the most time, money or sleep

Sales and quotes

Writing quotes · Following up

Marketing

Social posts · Newsletters

Customer service

Same questions every week ·
Reviews

Operations

Scheduling jobs or shifts ·
Ordering supplies

Finance

Invoices and bills · Chasing
payments

People

Hiring · Training new staff

Paperwork

Reports · Compliance forms ·
Administrative

Your own job

The part of your week you
dread

Not sure? Pick the one where: work piles up or gets forgotten · you're doing it after hours · the same problem keeps coming back

Leading a team? Pick where your people lose the most hours.

Starting out? Pick the one you dread doing every week.

In the chat: type the ONE business function you picked.

PICK ONE PROCESS IN YOUR BUSINESS FUNCTION:

5 questions to assess any process

SCREENSHOT THIS



ASK YOURSELF

1 What are the steps, start to finish?

2 How often, and how long?

3 Who does it, with what tools?

4 Where does it get stuck?

5 What would better look like?

EXAMPLE: SALES QUOTES OR PROPOSALS AT A 12-PERSON B2C/B2B SERVICE COMPANY

Site visit, measure/scope, price it, write it up, send it, follow up.

About 10 a week. 45 minutes each to write up. = 7.5 hours/wk

The owner, at night, in Word and email.

Prices live in an outdated PDF. Follow-ups get forgotten.

Every quote out the same day, every follow-up sent. More Sales. Fewer nights spent working.

In the chat: your process and its slowest step?

Level up: run these questions on a process your team shares.

WRITE IT DOWN

What AI can do in each area

SCREENSHOT THIS



AREA	THE TASK	WHAT AI DOES	YOU CHECK
Sales and quotes	Quote follow-ups	Drafts a friendly reminder from your notes	Prices and dates
Marketing	A week of social posts	Drafts 5 posts from a photo and one line	Facts and tone
Customer service	The same 10 questions	Drafts clear answers you can reuse	Policies, promises
Operations	Shift handoff notes	Turns rough notes into a clean summary	Names and times
Finance	Late-payment reminders	Drafts a polite reminder, then a firmer one	Amounts, due dates
People	Job post, new-hire list	Drafts the post and a first-week checklist	Pay, legal wording
Paperwork	Grant or monthly report	Drafts a first version from your bullets	Every number
Your own job	Meeting notes	Turns notes into action items and emails	Who owns what

WRITE IT DOWN

What do you do over and over in this business function?

Add 1 more process. Write how often, how long, and what makes it a pain.

LIKE THIS (MADE UP) Business Function: SALES

Writing quotes · 10 a week · 45 min each · 7+ hours a week, mostly at night

Following up on quotes · every Monday · 1 hour · half get forgotten, we lose jobs we already priced

Answering "where's my quote?" calls · every day · 20 min · same 5 questions, interrupting real work

Write it down then type it in the chat

Which of your two processes is a quick win?

WRITE IT DOWN



Run both processes through the check below. Pick the one with more yeses.

Quick win

Big help, small effort. Start here.

Like: Following up on quotes

Big project

Big help, big effort. Plan it later.

Like: Writing quotes and proposals

Nice to have

Small help, small effort. Anytime.

Like: Ready made replies to "where's my quote?"

Skip for now

Small help, big effort. Not yet.

Like: A custom quoting app

Quick-win check: Do you do it often? Is it annoying?

Low risk if AI gets it wrong?

Most yeses wins. A tie? Pick the one that bugs you most.

**In the chat: The quick win you
picked**

Description

Effectively describing goals to prompt useful AI behaviors and outputs.

Tell it clearly and in great detail what you want.

In the chat: what's the last thing you asked AI? New to it? Type "new." Everyone starts somewhere.

What goes into a great prompt

SCREENSHOT THIS



Garbage in, garbage out. The words in quotes are ready to copy.

Give context

Who you are, who it's for.

"I own a 12-person B2C service business in Uniontown."

Show an example

Paste something you like.

"Here's a post I liked. Match this tone."

Set the output format

Length, tone, layout.

"Under 100 words, friendly, no jargon."

Break it into steps

One job at a time.

"First list the problems. Then rank them."

Ask it to think first

Slow it down.

"Think it through before you answer."

Give it a role

Tell it who to be.

"Act as an experienced business advisor."

Source: Anthropic, "6 Techniques for Effective Prompt Engineering" (2025). Examples are made up.

Power Lines for Every Prompt

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Add these to ANY prompt. They stop AI from guessing and get you a better first answer.

1. "Here's who this is for and why it matters: ____."
2. "Here's what a great result looks like: ____."
3. "Use only what I give you. If something's missing, ask me."
4. "Never assume. Never make anything up."
5. "Show me where each fact came from."
6. "If you're not sure, say 'I'm not sure.'"
7. "Give me 2 or 3 options, then tell me which you'd pick and why."
8. **For big tasks: "Ask me clarifying questions, one at a time, until you are 95% certain of our goals, objectives, and expectations."**

Your Turn: Find Where AI Fits

SCREENSHOT THIS



I'm the **[your role]** at **[your business, in a few words]**. I want AI to save me time on one business process: **[the quick win you picked today]**.

Act as an experienced business advisor. Interview me one question at a time, no more than 10 questions, until you understand how this process runs today: the steps, who does them, how long they take, and where it gets stuck.

Then show me which steps you could take off my plate and which should stay with a person. Pick the one step with the biggest payoff and do it with me right now.

Never assume or make anything up. If you're not sure, say so. Be concise. Use bullet points with descriptions. Limit to 1,200 words or less.

Copy this prompt and paste it into your AI. Fill in the red blanks. Answer its questions. (Finish tonight)

Use AI daily? Run it on your hardest task, or most time-consuming task. Then ask it to rate itself and turn it into a template.

Discernment

Accurately assessing the usefulness of AI outputs and behaviors.

Check what it gives you, then tell it what to fix. Repeat.

Evaluate and Reprompt

SCREENSHOT THIS



ASK YOURSELF

1 Does this response make sense?

2 Does this accurately reflect my business?

3 What is missing?

4 What assumptions are you making?

5 Is the tone, phrasing, style comfortable?

WHAT TO RESPOND

If no: add details that are wrong or missing.

If no: add details about your business or product.

What additional context is needed on your business or goals?

"That assumption is invalid because ____."

The tone and style are too formal and verbose. My style is casual and direct. Update the tone and make concise.

Put all your fixes in one reply. Then check the new answer the same way. Repeat until it's right.

Challenge Lines for Every Answer

SCREENSHOT THIS



AI will make things up with fantastic confidence. Use these after ANY answer. They catch what AI got wrong and turn a first draft into a great one.

1. "On a scale of 1 to 10, rate the output you just gave me."
2. "What would make it a 10?"
3. "What did you assume? What are you unsure about?"
4. "Where could this be wrong? Show me your sources."
5. "Did you do what I asked? Check it against my instructions."
6. "Shorter, plainer, and in my tone: ____."
7. "Imagine this plan falls apart by Wednesday. What went wrong?"
8. Then YOU check names, numbers and dates against your own records.

In the chat: which line will you use first?

Diligence

Taking responsibility for what we do with AI and how we do it.

Protect private information, be honest about AI's role, and stand behind what you send.



- 1 **ACCOUNTABILITY.** Never, ever share these 5 things: Personal data, Intellectual property, Creative work, Financial information, Medical information.
- 2 **ACCURACY.** What are the approved uses. Who approves a final output that will go to clients, be made public, affects employees or be used in decision-making?
- 3 **APPROVAL/TOOLS.** Tools must be approved before use. Budget expenditure for a new AI tool, resource, or training. Who documents the fact the tool is available in the company?
- 4 **ACCESS:** Access to information should follow the same rules applied to your business software. i.e. Quickbooks only accessible to accountant.
- 5 **ADOPTION.** What channels are used to share what is learned by your best employees to other employees?

ACCOUNTABILITY - ACCURACY - APPROVAL - ACCESS - ADOPTION



Keep the momentum

You picked a business function, found your quick win and started it with AI. Let's make sure you keep going.

Screenshot this. Fill it in later today.



Write down your 3 answers

I

My top places to start with AI

Example: Quote follow-ups. Monday team schedule. Customer FAQ replies.

2

The one thing I started today

Example: AI mapped my quote follow-up process: 6 steps, 3 it can draft. It wrote my first follow-up email.

3

My next step, with a day and time

Example: Monday at 8am, I'll paste in last week's open quotes and have AI draft every follow-up. I review and send by 9.

A strong next step has 4 parts: WHEN (day and time) · WHAT (one task) · WHO DOES WHAT (AI drafts, you review) · IF IT GOES WRONG (your backup plan)

Strong: "Mondays at 8am, AI drafts my quote follow-ups. I review and send by 9am. If it gets something wrong, I'll ask what it assumed."

Today: save your screenshots in one folder on your computer.

Your AI assessment map

SCREENSHOT THIS



You worked through one business function today. Same steps for the other 7: pick an area, map it, pick a quick win.

Sales and quotes

Writing quotes · Following up

[] DONE

Marketing

Social posts · Newsletters

[] DONE

Customer service

Same questions every week ·

Reviews

[] DONE

Operations

Scheduling jobs or shifts ·

Ordering supplies

[] DONE

Finance

Invoices and bills · Chasing payments

[] DONE

People

Hiring · Training new staff

[] DONE

Paperwork

Reports · Grant and compliance forms

[] DONE

Your own job

The part of your week you dread

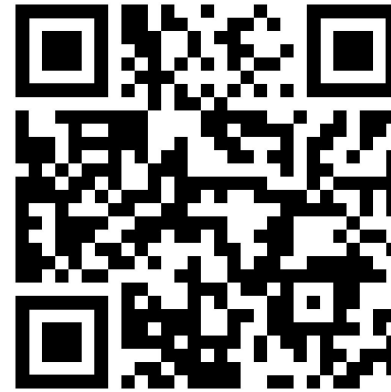
[] DONE

Pick your next business function now, and give it a date.

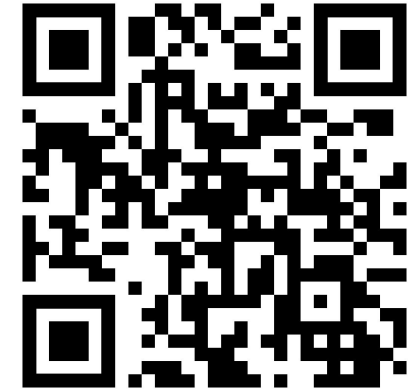
Your Questions



CONNECT ON LINKEDIN:



Ashley Canada



Eric Canada

In the chat:

1. On a scale of 1-10, how much did you learn today?
2. What is one thing you'll use right away?
3. What is something you'd love to learn more about in the next session?

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Next: Session 2

Thursday, October 22

8:00am ET (7:00am CT)

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