# The AI Execution Playbook for SMBs

Turning hype into ROI without Fortune 500 budget

Practical guide for \$1-10M businesses to use Al now





# Start with What You've Got



#### Pick One Metric

Time to invoice or lead-to-close ratio



## **Track in Google Sheets**

Simple measurement before AI enhancement



#### Add No-Code AI

Email parsing or automated follow-ups



## Measure Again

Sanity tests over scorecards



	D	E	F	G
on	Units Sold	Total Sales Amount	Store Region	Profit
	20	\$33000	New York	\$9000
	55	\$40000	Arizona	\$2000
	60	\$30000	Dallas	\$7000
	34	\$20000	Dallas	\$6000
	56	\$15000	California	\$4000
	66	\$60000	New York	\$2121
	45	\$70000	New York	\$2000
	30	\$45000	Dallas	\$5000
	50	\$35000	California	\$7000
	35	\$20000	Dallas	\$11000
	46	\$30000	New York	\$6000
	76	\$30500	Arizona	\$9000
	54	\$30200	Arizona	\$8000
	34	\$40000	New York	\$7000
	75	\$50000	California	\$5000
	81	\$80000	Dallas	\$4000
	20	\$20000	Texas	\$5000
	34	\$30000	Texas	\$9800
	67	\$35000	Texas	\$6600



# Al in Workflows, Not Roadmaps

1

## **Feature Flag**

Add Al buttons to existing tools

2

### **Make Practical**

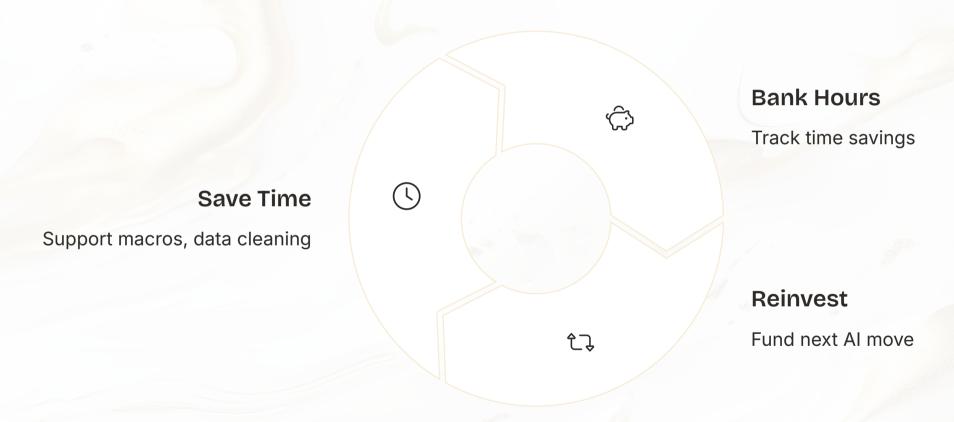
Help buttons, draft generators

3

## Measure Usage

Focus on adoption metrics

# 15-Day Return Windows



# **Context Beats Custom**

# **Skip Fine-Tuning**

Most SMBs don't need custom models

Use context injection instead

# Retrieval-Augmented

ChatGPT plus vector database

Pinecone or Weaviate tools

# **Front-Line Al Access**



**Marketing Lead** 

Notion Al plus Zapier



**Operations Lead** 

Airtable plus GPT



Sales Lead

ChatGPT plus Clay





# No-Code First Approach

#### **Chain Actions**

Make.com or Zapier automation

### **Build Interfaces**

Retool or Typedream platforms

## **Avoid Complexity**

LangChain only when outgrown Airtable



# Track Hours, Not Percentages

10

**Hours Saved** 

Per team member monthly

30

**Day Window** 

Return cash within month

9

First KPI

Time before revenue



# Start Now, Not Later

## **Test and Track**

Embed Al agents in workflows

## **Measure Hours**

Track time returned consistently

## **Empower Team**

Let everyone experiment and play