

The AI Execution Playbook for SMBs

Turning hype into ROI without Fortune 500 budget

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



by Erik Schwartz



Start with What You've Got

12

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

	Data	Review	View	Automate	Help	Acrobat	Power Pivot	FU
	≡	≡	≡	ab	General	Conditional Formatting		
	≡	≡	≡	↔	Format as Table			
	≡	≡	↔	↔	Cell Styles			
	Alignment	Number	Styles					

	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

A glowing button with the text "AI help" on a blue background. The button is orange with a yellow glow and is tilted diagonally.

AI help

AI in Workflows, Not Roadmaps

1

Feature Flag

Add AI 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 AI Access



Marketing Lead

Notion AI 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

1

First KPI

Time before revenue



Start Now, Not Later

Test and Track

Embed AI agents in workflows

Measure Hours

Track time returned consistently

Empower Team

Let everyone experiment and play