E EMPIRE BUILDER ACADEMY

THE COMPLETE COURSE

THE ONLINE ENTREPRENEUR BLUEPRINT

From Zero to Your First Online Business. All 9 modules and 78 lessons, with worksheets, action checklists, knowledge checks, and 149 copy-and-paste AI prompts.

THE ONLINE ENTREPRENEUR BLUEPRINT

From Zero to Your First Online Business

BUILD SMART. LAUNCH FAST. SCALE WITH AI.

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WELCOME TO THE ONLINE ENTREPRENEUR BLUEPRINT

MODULE OVERVIEW: You don't need a business degree, a massive budget, or a technical background to start building a business. You need a plan, the right tools, and the willingness to execute. This course gives you the plan and the tools. The execution is yours.

Who This Course Is For

This course was written for people starting from zero:

- People who want to start a business but don't know where to begin.
- People tired of their jobs who want to build something of their own, on the side or eventually full time.
- Aspiring entrepreneurs who have ideas but no clear process.
- Freelancers who want to turn their skills into a more organized business.
- Small-business owners who want to modernize with a website, digital marketing, and AI.
- Anyone curious about using AI, building websites, and attracting customers online.

What You'll Build

By working through all nine modules, you will:

1. Choose a business direction and niche based on real customer problems and evidence of demand.
2. Set up a professional foundation: name, structure, EIN, banking, email, domain, bookkeeping, and licenses.
3. Use AI tools as a practical business partner, with a library of copy-and-paste prompts.
4. Build and publish a website with a clear homepage, offer pages, contact forms, and lead capture.
5. Create a marketing plan across the channels that fit your customers.
6. Design an offer, price it with confidence, and build a simple sales funnel.
7. Understand how to sell digital, physical, and print-on-demand products online.
8. Automate repetitive work, build systems, and measure performance.
9. Follow a practical 30-day launch plan with daily tasks and checklists.

What We Promise, and What We Don't

We promise a clear, structured, honest plan; practical tools; and lessons written for complete beginners.

We do not promise income, profits, or any particular result. Nobody can honestly promise that. Results depend on your market, your offer, your effort, your time, and factors outside anyone's control. Every example in this course is clearly labeled as **hypothetical**. There are no fake testimonials, invented success stories, or made-up statistics in these pages.

MODULE 0

How to Use This Course

The Structure of Every Module

Each module follows the same format so you always know where you are:

- **Lessons:** plain-English explanations of each topic.
- **Examples (hypothetical):** illustrations that show how an idea might work in a realistic small business.
- **Step-by-step instructions:** numbered actions you can follow.
- **Copy-and-paste AI prompts:** shown in dark boxes with an orange header. Replace anything in [BRACKETS] with your own details.
- **Exercises:** short assignments shown in orange-edged boxes.
- **Worksheet:** a fillable worksheet for the module (also available as a separate PDF and an editable DOCX file).
- **Action checklist:** the module's must-do actions.
- **Knowledge check:** a short quiz with an answer key at the end of the module.

Recommended Pace

- **Steady pace (recommended):** one module per week, 3–5 hours per week. Finish in about nine weeks.
- **Fast track:** If you need to move quickly, read Modules 1, 6, and 9 first, then follow the 30-day plan in Module 9, returning to other modules as each day's task requires.
- **Already in business?** Jump to the module that matches your current bottleneck: website (Module 4), marketing (Module 5), sales (Module 6), or systems (Module 8).

How to Get the Most From It

1. **Do the exercises.** Reading creates understanding; doing creates progress.
2. **Use the worksheets.** They become your business plan.
3. **Build a Prompt Library.** Save prompts that work well for you.
4. **Talk to real customers early and often.** No course, AI tool, or template replaces real conversations.
5. **Don't wait for perfect.** Launch simple versions, then improve.
6. **Verify facts.** Especially anything legal, tax-related, or generated by AI.

Using the AI Prompts

The prompts work with most modern AI assistants (for example ChatGPT, Claude, Gemini, or Copilot). For best results:

- Replace every [PLACEHOLDER] with specific details.

- Paste in real information (your notes, customer quotes, competitor pages) whenever a prompt asks for it.
- Ask follow-up questions and request revisions.
- Review every output. You're responsible for what you publish and send.
- Don't paste sensitive personal or customer data into AI tools unless you understand and accept their data policies.

Important Notices

LEGAL AND TAX NOTICE: This course provides general educational information focused on U.S. businesses. It is not legal, tax, accounting, or financial advice. Laws and regulations vary by state and locality and change over time. Verify requirements with official sources such as IRS.gov, SBA.gov, FTC.gov, and your state and local government websites, and consult qualified professionals for advice about your situation.

NOTE: Tools, platforms, and features mentioned in this course are examples, not endorsements, and their features, prices, and policies change frequently. Empire Builder Academy has no affiliate relationship with the tools mentioned unless explicitly disclosed. Always check current details on official websites.

The Course Map

Module	Title	Core outcome
1	The Entrepreneur Mindset	A validated business direction and niche
2	Build Your Business Foundation	A legally and financially organized business
3	AI Is Your New Business Partner	AI assistants and a prompt library
4	Build Your Website	A live, professional website
5	Marketing Your Business	A brand and marketing plan
6	Selling and Getting Customers	A clear offer, pricing, and sales process
7	Build an Online Store	A product plan, store setup, and fulfillment process
8	Automate and Scale	Systems, automations, and performance tracking
9	Your First 30 Days	A practical launch plan you can start today

Let's build.

MODULE

01

THE ENTREPRENEUR MINDSET

1.1 Understanding Online Business Models

1.2 Choosing a Business Direction

1.3 Identifying Customer Problems

1.4 Researching Market Demand

1.5 Finding a Profitable Niche

1.6 Avoiding Common Beginner Mistakes

MODULE 1: THE ENTREPRENEUR MINDSET

MODULE OVERVIEW: Before you pick a name, build a website, or touch an AI tool, you need a direction. This module helps you understand the main ways people make money online, choose a business direction that fits your life, find real problems people will pay to solve, check whether demand exists, narrow down a niche, and avoid the mistakes that stall most beginners. By the end, you will have one clearly written business direction you can test in the real world.

In this module:

- Lesson 1.1: Understanding Online Business Models
- Lesson 1.2: Choosing a Business Direction
- Lesson 1.3: Identifying Customer Problems
- Lesson 1.4: Researching Market Demand
- Lesson 1.5: Finding a Profitable Niche
- Lesson 1.6: Avoiding Common Beginner Mistakes

> **NOTE:** Nothing in this course guarantees income or results. Every business involves risk, effort, and time. What this course gives you is a structured plan, practical tools, and a way to make better decisions. The outcome depends on your market, your execution, and many factors outside anyone's control.

LESSON 1.1

Understanding Online Business Models

The Big Idea

A **business model** is simply the answer to one question: *How does this business deliver value to customers and get paid for it?* Many beginners start with "I want to make money online," which is too vague to act on. When you understand the common models, you can pick one that matches your skills, budget, and available time.

Online businesses generally fall into a handful of models. Most real businesses combine two or three of them over time, but you should **start with one.**

The Seven Core Online Business Models

1. Services (freelancing or done-for-you work). You sell your time and skill: writing, design, bookkeeping, social media management, video editing, virtual assistance, consulting, tutoring, web design. Services are usually the fastest model to start because you need no inventory and very little upfront money. The trade-off: your income is tied to your hours until you build systems or hire help.

2. Local service businesses marketed online. A physical service (cleaning, lawn care, pet sitting, mobile car detailing, handyman work) that gets customers through a website, Google Business Profile, and social media. The work is offline; the marketing is online. These often have strong local demand and less global competition.

3. Digital products. Templates, e-books, printables, spreadsheets, presets, guides, stock assets, mini-courses. You create once and can sell many times. Low cost to deliver, but you must build an audience or traffic source, and many digital product categories are crowded.

4. Physical products (e-commerce). Selling tangible goods through your own store or a marketplace. Options include buying wholesale inventory, making products by hand, or using print-on-demand (covered in Module 7). Higher complexity: inventory, shipping, returns, and thinner margins.

5. Content and audience businesses. Blogs, YouTube channels, newsletters, podcasts. Revenue usually comes from advertising, sponsorships, affiliate commissions, or selling your own products to the audience. This model typically takes the longest to produce revenue because you need to build an audience first.

6. Affiliate marketing. You recommend other companies' products and earn a commission when someone buys through your link. You don't handle products or customer service, but you also don't control pricing, and you must disclose affiliate relationships clearly (the Federal Trade Commission requires clear disclosure of material connections; see FTC.gov's endorsement guidance).

7. Coaching, courses, and education. You teach a skill or guide people through a transformation, one-on-one, in groups, or with recorded courses. Works best when you have real, demonstrable skill or experience in the topic.

Comparing the Models

Model	Startup cost	Speed to first sale	Scalability	Skills needed
Services / freelancing	Very low	Fast	Low–medium	A sellable skill
Local service, online marketing	Low–medium	Fast–medium	Medium	Service skill + local marketing
Digital products	Low	Medium	High	Creation + marketing
Physical products	Medium–high	Medium	Medium–high	Operations, sourcing
Content / audience	Low	Slow	High	Consistency, content creation
Affiliate marketing	Low	Slow–medium	Medium–high	Content, SEO, trust
Coaching / education	Low	Medium	Medium	Expertise, communication

These ratings are general tendencies, not rules. A particular business can break any of them.

> **EXAMPLE (HYPOTHETICAL):** Imagine "Maya," a fictional office administrator who is very good with spreadsheets. She could (a) offer spreadsheet setup as a freelance service, (b) sell budget templates as digital products, (c) teach a small online workshop on spreadsheet basics, or (d) write a blog reviewing spreadsheet tools with affiliate links. Same skill, four models. A sensible start for her would be the service model, because it gets her in front of real customers fastest, and what she learns from those customers can later become templates or a course.

Step-by-Step: Map Your Options

1. Write down three skills, interests, or experiences you have (work skills count; so do hobbies).
2. For each one, write how it could fit at least three of the seven models.
3. Mark which options you could start within 14 days with less than $200.
4. Circle the one option that feels most realistic for your current schedule.

AI Prompt: Map Your Skills to Business Models

COPY-AND-PASTE AI PROMPT

Act as a practical small-business advisor for complete beginners.
Here are my skills, interests, and experience:
[LIST 3-5 SKILLS, JOBS, HOBBIES]

My constraints:
- Weekly hours available: [NUMBER]
- Startup budget: [AMOUNT]
- Location: [CITY/STATE or "online only"]

For each skill, suggest how it could work under these models:
services, local service, digital products, physical products,
content, affiliate, and coaching/education.
Then rank the 5 most realistic options for my constraints, explaining
startup cost, time to first customer, and main risk for each.
Do not promise income. Be honest about difficulty.

EXERCISE 1.1: Complete the "Business Model Map" in your Module 1 Worksheet. List at least three skills and connect each to at least three models. Highlight your top two options.

LESSON 1.2

Choosing a Business Direction

The Big Idea

You don't need the perfect idea. You need a **good-enough direction you can test quickly.** Beginners lose months searching for a perfect idea. In reality, most businesses evolve after contact with real customers. Your goal in this lesson is to choose one direction for the next 90 days.

The Four-Circle Filter

A strong starting direction usually sits where four things overlap:

1. **Skill:** something you can do now, or learn quickly to a professional standard.
2. **Interest:** something you can tolerate working on for many months, ideally enjoy.
3. **Demand:** people already spend money on solutions in this area.
4. **Fit:** it fits your time, budget, health, family situation, and risk tolerance.

If an idea misses "Demand," it's a hobby. If it misses "Fit," you'll likely burn out. If it misses "Skill," you'll need time to learn first, which is fine, just plan for it.

The Idea Scoring Method

Score each idea from 1 (weak) to 5 (strong) on these criteria:

Criterion	Question to ask
Skill	Can I deliver this well today?
Interest	Will I still care about this in 6 months?
Demand	Can I find people already paying for this?
Reachability	Do I know where these customers spend time?
Startup cost	Can I start with what I have? (5 = very cheap)
Speed	Could I get a first paying customer within 30–60 days?

Add the scores. The highest total isn't automatically the winner, but it's a strong signal. Any idea that scores 1 on Demand should be paused until you find evidence of demand.

> **EXAMPLE (HYPOTHETICAL):** A fictional retail worker named "Devon" has three ideas: a sneaker-cleaning service, a fantasy football newsletter, and resume-writing services. He scores them: sneaker cleaning 22/30, newsletter 17/30, resume writing 25/30. Resume writing wins because he has done hiring at his store (skill), can find people paying for it on freelance marketplaces (demand), and can start with a laptop (low cost). He decides to test resume writing for 90 days and keep the sneaker idea in a "later" list.

Step-by-Step: Choose Your 90-Day Direction

1. Brainstorm 5–10 ideas without judging them.
2. Cross out any idea that is illegal, requires licenses you can't get soon, or needs money you don't have.
3. Score the remaining ideas with the table above.
4. Pick the top one. Write it as a one-sentence direction: *"I help [who] with [what] through [model]."*
5. Set a review date 90 days from today. You will not switch directions before then unless you find strong evidence there's no demand.

AI Prompt: Score My Ideas Honestly

COPY-AND-PASTE AI PROMPT

```
I'm choosing a business direction. Score each idea below from 1-5 on:
skill fit, interest, market demand, ability to reach customers,
low startup cost, and speed to a first paying customer.

About me: [SKILLS, EXPERIENCE, HOURS PER WEEK, BUDGET]
My ideas:
1. [IDEA]
2. [IDEA]
3. [IDEA]

Present results in a table with totals. Then give me the strongest
argument AGAINST my top-scoring idea, so I can see its risks clearly.
Finish with one sentence describing the idea in the format:
"I help [who] with [what] through [business model]."
```

AI Prompt: Find Ideas I'm Overlooking

COPY-AND-PASTE AI PROMPT

```
Ask me 10 questions, one at a time, about my work history, hobbies,
problems I've solved for friends, and things people ask me for help with.
After my answers, suggest 10 business ideas that use what I already know.
For each, name the business model and the first small test I could run
in under 7 days for under $50.
```

EXERCISE 1.2: Score at least three ideas in the "Idea Scoring Table" on your worksheet and write your one-sentence 90-day direction.

LESSON 1.3

Identifying Customer Problems

The Big Idea

People don't buy products. They buy **solutions to problems** and **progress toward goals.** Someone doesn't want a logo; they want their business to look trustworthy. Someone doesn't want a meal plan; they want to feel healthier without spending hours planning. When you understand the problem deeply, your marketing, offer, and pricing become much easier.

Three Types of Problems Worth Solving

- **Painful problems:** something is costing people money, time, stress, or embarrassment right now ("My website looks outdated and I'm losing clients").
- **Urgent problems:** there's a deadline ("I need a resume by Friday").
- **Aspirational goals:** people want to reach a desired state ("I want to start running and finish a 5K").

The strongest opportunities are **painful + urgent**, among people who **already spend money** trying to solve them.

Where to Find Real Problems

You are looking for the words customers actually use. Good places to listen:

- **Online communities:** Reddit, Facebook Groups, niche forums, Discord servers. Search for phrases like "how do I," "struggling with," "frustrated," "recommend," "is it worth."
- **Product reviews:** Read 3-star and 2-star reviews on Amazon, app stores, Etsy, or Google reviews of competitors. Middle reviews often explain exactly what's missing.
- **Q&A sites and search suggestions:** Type the start of a question into Google or YouTube and look at autocomplete suggestions and the "People also ask" box.
- **Your own network:** Ask people directly. Conversations are the most valuable research you can do.
- **Your own experience:** Problems you've personally had and solved are a strong starting point.

How to Run a Problem Interview

A problem interview is a 15–20 minute conversation with someone in your target audience. You are **not selling.** You're learning.

1. Find 5–10 people who match your target customer (friends of friends, community members, local business owners).
2. Ask permission: "I'm researching a business idea about [topic]. Could I ask you a few questions for 15 minutes? I'm not selling anything."
3. Ask about past behavior, not hypothetical future behavior. People are poor predictors of what they'll buy, but good reporters of what they've done.

4. Take notes using their exact words.
5. Thank them and ask: "Who else should I talk to?"

Good interview questions:

- "Tell me about the last time you dealt with [problem]."
- "What did you try to fix it? What happened?"
- "What did you spend money on to solve it, if anything?"
- "What's the most frustrating part?"
- "If you could wave a magic wand, what would be different?"

Questions to avoid: "Would you buy this?" and "Do you like my idea?" Most people say yes to be polite.

> **EXAMPLE (HYPOTHETICAL):** A fictional aspiring business owner named "Priya" wants to offer social media help for local bakeries. In interviews with three bakery owners, she learns that none of them want "social media strategy." What they actually describe is: "I never have time to take decent photos" and "I post randomly and then feel guilty when I stop." That changes her offer from "social media management" to "a monthly photo session plus a month of ready-to-post content." The words came straight from the customers.

Step-by-Step: Build Your Problem List

1. Choose one target customer group from your direction sentence.
2. Spend 60 minutes reading communities and reviews. Copy at least 15 exact phrases describing frustrations.
3. Group similar phrases into 3–5 problem themes.
4. For each theme, rate pain (1–5), urgency (1–5), and evidence of spending (yes/no).
5. Schedule at least three problem interviews this week.

AI Prompt: Organize Customer Language

COPY-AND-PASTE AI PROMPT

```
Below are real quotes I collected from online communities and reviews
written by [TARGET CUSTOMER]. Group them into 3-5 problem themes.
For each theme:
- Give it a short name
- Summarize the underlying problem in plain language
- Rate how painful and urgent it appears (1-5) based ONLY on the quotes
- List the exact phrases I could reuse in my marketing
Do not invent quotes or add statistics.

Quotes:
[PASTE YOUR COLLECTED QUOTES]
```

AI Prompt: Prepare a Problem Interview

COPY-AND-PASTE AI PROMPT

```
I'm interviewing [TARGET CUSTOMER] about [PROBLEM AREA].
Write a 15-minute interview script with:
- A friendly opening that makes clear I'm not selling anything
- 8 open-ended questions focused on past behavior and real experiences
- 3 follow-up probes for digging deeper
- A polite closing that asks for referrals to others I could talk to
Avoid leading questions and avoid "would you buy" questions.
```

EXERCISE 1.3: Fill in the "Customer Problem Log" on your worksheet with at least 10 real quotes and 3 problem themes. Book at least three interviews.

LESSON 1.4

Researching Market Demand

The Big Idea

Demand means **people are already spending money** to solve the problem you've identified. Contrary to common belief, competition is often a *good* sign: it shows a market exists. A total absence of competitors can mean you've found a gap, but more often it means there's no paying market.

Five Free Ways to Check Demand

1. Search engine signals. Search for your service or product. Are there ads at the top of the results? Advertisers usually pay for clicks only when searches lead to sales. Look at autocomplete suggestions and "People also ask" questions.

2. Keyword tools. Free or freemium tools (for example, Google Trends, Google Keyword Planner inside a Google Ads account, and the free tiers of various SEO tools) show relative search interest. Google Trends shows whether interest is rising, falling, or seasonal. Treat all keyword volume numbers as rough estimates.

3. Marketplaces. Check Etsy, Amazon, Fiverr, Upwork, and similar platforms. Look at how many sellers exist, how many reviews top listings have, and what price ranges are common. Review counts suggest (but don't prove) sales activity.

4. Competitor presence. Find 5–10 businesses offering something similar. Do they have active websites, recent social posts, reviews, and published pricing? Active, established competitors suggest a functioning market.

5. Direct evidence. The strongest demand signal is someone giving you money or a firm commitment. A pre-sale, a paid pilot, or a deposit beats any amount of keyword research.

The Demand Evidence Ladder

From weakest to strongest evidence:

1. You think it's a good idea.
2. Friends say it's a good idea.
3. People online discuss the problem.
4. Competitors exist and appear active.
5. People search for solutions (keyword and trend data).
6. Strangers join a waitlist or give you their email.
7. Strangers book a call or request a quote.
8. Strangers pay you.

Aim to reach at least rung 6 or 7 before investing significant money or months of building.

EXAMPLE (HYPOTHETICAL): Imagine a hypothetical dog-walking business in a mid-sized suburb. The founder searches "dog walker near me" and sees three local competitors with Google reviews and published prices, plus a pet-care marketplace listing several walkers. Google Trends shows steady interest year-round. She posts a simple flyer in two neighborhood groups offering a discounted trial walk and gets several inquiries. That's rung 7: real people requesting the service. Enough evidence to keep going.

Step-by-Step: Run a One-Week Demand Check

1. **Day 1:** Search 10 phrases your customers would type. Record ads, autocomplete, and "People also ask."
2. **Day 2:** Check Google Trends for 3–5 key phrases over 5 years. Note direction and seasonality.
3. **Day 3:** Find 5–10 competitors. Record their offer, price, reviews, and what customers complain about.
4. **Day 4:** Check 2–3 marketplaces for listings, price ranges, and review counts.
5. **Day 5–7:** Run one direct test: a simple post, flyer, or landing page with a clear call to action (join a waitlist, book a free consultation, or pre-order).

AI Prompt: Build a Demand Research Plan

COPY-AND-PASTE AI PROMPT

```
I want to validate demand for: [YOUR BUSINESS DIRECTION]
Target customer: [WHO]
Location (if local): [CITY/REGION or "online"]

Create a 7-day demand research plan for a beginner with no budget.
Include:
- 15 search phrases a real customer might type
- Which free tools and marketplaces to check and what to record
- How to identify and analyze 5 competitors
- One low-cost direct test I can run by day 7
Remind me to verify any numbers myself instead of trusting estimates.
```

AI Prompt: Analyze Competitor Reviews

COPY-AND-PASTE AI PROMPT

Here are customer reviews of competitors in my market.
Summarize:
1. What customers consistently praise
2. What customers consistently complain about
3. Unmet needs or gaps I could address
4. Language patterns I could reflect in my marketing
Only use what appears in the reviews. Do not invent details.

Reviews:
[PASTE REVIEWS]

IMPORTANT: AI tools can produce plausible-sounding but incorrect market numbers. Never rely on an AI-generated statistic (market size, search volume, growth rate) without checking an original source.

EXERCISE 1.4: Complete the "Demand Evidence Tracker" on your worksheet. Record evidence for at least five rungs of the ladder you can currently reach.

LESSON 1.5

Finding a Profitable Niche

The Big Idea

A **niche** is a specific group of people with a specific problem. "Fitness coaching" is a market. "Strength training for busy nurses who work night shifts" is a niche. Niching down feels scary because it seems to shrink your market, but it usually makes marketing *easier*: your message is clearer, you know where to find customers, and you face fewer direct competitors.

"Profitable" here doesn't mean guaranteed profit. It means the niche has the *characteristics* that make profit possible: people with a real problem, the ability to pay, and a way for you to reach them.

The Niche Formula

[Specific audience] + [Specific problem or goal] + [Specific outcome or method]

- Bookkeeping → Bookkeeping cleanup for independent hair salon owners.
- Web design → One-page websites for new home-cleaning businesses.
- Meal planning → Budget meal plans for families with picky eaters.
- Social media → Short-form video editing for real estate agents.

Five Signs of a Promising Niche

1. **Identifiable:** you can describe who they are and where they gather.
2. **Reachable:** there are groups, hashtags, directories, associations, or events where they spend time.
3. **Able to pay:** they already spend money in this area, or the problem costs them money.
4. **Motivated:** the problem is painful or urgent enough to act on.
5. **Sustainable for you:** you're willing to serve these people for years.

How Narrow Is Too Narrow?

If you can't find at least a few hundred potential customers you could realistically reach (or a few dozen for high-priced services), the niche may be too narrow. If your message could apply to "anyone," it's too broad. You can always widen later; it's much harder to stand out when you start broad.

> **EXAMPLE (HYPOTHETICAL):** A fictional graphic designer starts as "graphic design for small businesses" and struggles to stand out among thousands of similar designers. She narrows to "menu and signage design for food trucks." Now she knows where to find customers (food truck events, local food truck associations, social media hashtags), what they need (menus readable from a distance, brand consistency), and what to show in her portfolio. Her marketing message becomes specific and memorable.

Step-by-Step: Narrow Your Niche

1. Write your broad market (e.g., "photography").
2. List 5 specific audiences within it (e.g., realtors, Etsy sellers, restaurants, dentists, newborn families).
3. For each audience, write the #1 problem they have related to your skill.
4. Score each audience 1–5 on the five signs above.
5. Choose the highest scorer and write your niche statement using the formula.
6. Find three places where that audience gathers online or locally. If you can't, reconsider.

AI Prompt: Generate Niche Options

COPY-AND-PASTE AI PROMPT

```
My broad skill/market is: [e.g., photography, bookkeeping, fitness]
My background and interests: [DETAILS]

Generate 10 specific niche options using the formula:
[specific audience] + [specific problem] + [specific outcome].
For each niche, list:
- Where this audience gathers (online and offline)
- Evidence they already spend money on this type of solution
- One risk or downside
Then recommend the 3 best niches for a beginner and explain why.
```

AI Prompt: Stress-Test My Niche

COPY-AND-PASTE AI PROMPT

```
My niche: [YOUR NICHE STATEMENT]
Play the role of a skeptical investor. Ask me the 10 toughest
questions about this niche: size, ability to pay, reachability,
competition, and my ability to deliver. After I answer, summarize
the biggest weaknesses and suggest how to reduce each risk.
```

EXERCISE 1.5: Use the "Niche Narrowing Table" on your worksheet to evaluate five audiences and write your final niche statement.

LESSON 1.6

Avoiding Common Beginner Mistakes

The Big Idea

Most early-stage businesses don't stall because the founder lacks talent. They stall because of predictable, avoidable mistakes. Knowing them in advance won't make you immune, but it helps you catch yourself early.

The 10 Most Common Beginner Mistakes

1. Building before validating. Spending months on a logo, website, or product before confirming anyone wants it. *Fix:* Get evidence of demand (Lesson 1.4) before investing heavily.

2. Trying to serve everyone. A message for everyone resonates with no one. *Fix:* Choose a niche (Lesson 1.5).

3. Perfectionism. Waiting until everything is "ready." *Fix:* Launch a simple version, then improve based on feedback. "Done and improving" beats "perfect and invisible."

4. Tool and course hopping. Buying tool after tool or course after course without taking action. *Fix:* Implement one lesson before moving to the next. This course is built around action checklists for that reason.

5. Ignoring the money basics. Mixing personal and business money, not tracking expenses, forgetting taxes. *Fix:* Module 2 covers the foundation.

6. Underpricing. Charging too little to sustain the business, often out of fear. *Fix:* Module 6 covers pricing based on value and costs.

7. No marketing plan. Assuming customers will find you once your site is live. *Fix:* Plan marketing from day one (Module 5).

8. Quitting too early or too late. Abandoning an idea after two weeks, or continuing for years with no evidence of traction. *Fix:* Set clear test periods (like your 90-day direction) and decision criteria in advance.

9. Believing hype. Trusting "get rich quick" claims, income screenshots, or "passive income" promises. *Fix:* Treat any guaranteed-income claim as a red flag. Real businesses take work.

10. Going it alone. Never asking for feedback or help. *Fix:* Talk to customers, join communities, and find a peer or mentor. Free mentoring resources exist, such as SCORE (score.org) and Small Business Development Centers (find one through SBA.gov).

Your Personal Risk Rules

Write down personal rules before you start, while you're calm and clear-headed. Examples:

- "I won't quit my job until my business has covered [X] months of my expenses consistently." (Decide your own number.)
- "I won't spend more than $[X] before getting my first paying customer."
- "I won't take on debt to fund this test."
- "I'll review progress every Sunday and make decisions based on data, not mood."

> **EXAMPLE (HYPOTHETICAL):** A fictional new founder, "Sam," spent four months building an elaborate app for gym owners before speaking to a single gym owner. When he finally did, he learned they already used software they liked. Contrast that with an equally hypothetical founder who spent two weeks interviewing gym owners first, discovered their real frustration was writing class descriptions and promotional emails, and offered a simple monthly copywriting service instead. The second approach risked far less time and money.

Step-by-Step: Create Your Guardrails

1. Read the 10 mistakes and circle the 3 you're most likely to make.
2. For each, write one specific rule to prevent it.
3. Set your maximum test budget and test period.
4. Schedule a weekly 30-minute review on your calendar.
5. Tell one person your plan and ask them to check in with you.

AI Prompt: Find My Blind Spots

COPY-AND-PASTE AI PROMPT

```
Here is my business plan in its current form:
[DIRECTION, NICHE, MODEL, BUDGET, TIMELINE]

Act as an experienced, honest mentor. Identify the 5 most likely
mistakes I'm about to make, based on common beginner pitfalls.
For each, explain why it's a risk for my specific plan and suggest
one concrete guardrail. Be direct but constructive.
```

AI Prompt: Weekly Review Coach

COPY-AND-PASTE AI PROMPT

```
Act as my weekly business review coach. Ask me these questions one
at a time and wait for my answer before asking the next:
1. What did I plan to do this week?
2. What did I actually do?
3. What evidence did I gather from real customers?
4. What's blocking me?
5. What are my 3 most important tasks next week?
At the end, summarize my week in 5 bullet points and point out
any pattern of avoidance or distraction you notice.
```

EXERCISE 1.6: Complete the "Personal Guardrails" section of your worksheet, including your test budget, test period, and three personal rules.

MODULE 1

Module 1 Worksheet

Fill in each section. Print it, type into the DOCX version, or copy the tables into your own notes.

Part A: Business Model Map

My skill / interest / experience	Model option 1	Model option 2	Model option 3

My top two options: _____

Part B: Idea Scoring Table (score 1–5)

Idea	Skill	Interest	Demand	Reachability	Low cost	Speed	Total

My 90-day direction: *"I help* _____ *with* _____ *through* _____."

Review date (90 days from today): _____

Part C: Customer Problem Log

Exact quote	Source (site/person)	Problem theme

Exact quote	Source (site/person)	Problem theme

Problem theme	Pain (1–5)	Urgency (1–5)	Evidence of spending?

Part D: Demand Evidence Tracker

Evidence rung	What I found	Date
People discuss the problem online		
Active competitors exist		
Search / trend data		
Waitlist or email sign-ups		
Calls or quote requests		
Paying customers		

Part E: Niche Narrowing Table (score 1–5)

Audience	#1 problem	Identifiable	Reachable	Able to pay	Motivated	Sustainable	Total

My niche statement: _____

Three places my niche gathers: 1) _____ 2) _____ 3) _____

Part F: Personal Guardrails

Maximum test budget: $_____ Test period: _____

The three mistakes I'm most likely to make, and my rule for each:

1. _____
2. _____
3. _____

Weekly review day and time: _____ Accountability person: _____

MODULE 1

Action Checklist

- [ ] Map at least three skills to the seven business models
- [ ] Score at least three business ideas
- [ ] Write a one-sentence 90-day business direction
- [ ] Collect at least 10 real customer quotes
- [ ] Identify 3 problem themes
- [ ] Book (or complete) at least three problem interviews
- [ ] Complete a one-week demand check
- [ ] Analyze at least five competitors
- [ ] Write a niche statement and identify where that niche gathers
- [ ] Set your test budget, test period, and personal rules
- [ ] Schedule a weekly 30-minute business review

MODULE 1

Knowledge Check

1. Which business model is usually fastest to start with the least money?
A) Physical products with inventory
B) Services/freelancing
C) A content-based YouTube channel
D) A mobile app

2. In a problem interview, which question is most useful?
A) "Would you buy this?"
B) "Do you like my idea?"
C) "Tell me about the last time you dealt with this problem."
D) "How much would you pay in the future?"

3. What does the presence of active competitors usually indicate?
A) The market is impossible to enter
B) A market with paying customers likely exists
C) You should immediately choose a different idea
D) Prices will be very low

4. Which is the strongest form of demand evidence?
A) Friends saying it's a great idea
B) High search volume estimates
C) Strangers paying you
D) Many social media likes

5. Which is the best example of a niche?
A) Fitness
B) Online marketing
C) Bookkeeping cleanup for independent hair salon owners
D) Helping people

6. True or false: An AI-generated market-size statistic can be used in your business plan without checking a source.

7. What is the main purpose of setting a 90-day test period?
A) To guarantee results
B) To avoid quitting too early or continuing too long without evidence
C) To delay launching
D) To satisfy a legal requirement

8. Which combination makes a problem most attractive to solve?

A) Mild and rare

B) Painful, urgent, and people already spend money on it

C) Interesting to you but not to others

D) Free to solve with a quick search

MODULE 1

Answer Key

1. **B.** Services require little upfront investment and can reach customers quickly.
2. **C.** Asking about real past behavior gives more reliable information than hypothetical questions.
3. **B.** Competition generally signals that a market exists. You then look for ways to differentiate.
4. **C.** Payment from strangers is the strongest evidence on the demand ladder.
5. **C.** It names a specific audience and a specific problem.
6. **False.** AI tools can produce incorrect numbers. Always verify with an original source.
7. **B.** A defined test period gives you a clear decision point based on evidence.
8. **B.** Painful, urgent problems where people already spend money are the strongest opportunities.

MODULE

02

BUILD YOUR BUSINESS FOUNDATION

2.1 Choosing a Business Name

2.2 Understanding LLCs and Incorporation

2.3 EIN Basics

2.4 Business Banking

2.5 Business Email

2.6 Domain Names

2.7 Basic Bookkeeping

2.8 Understanding Business Expenses

2.9 Understanding Licenses and Permits

2.10 Separating Personal and Business Finances

MODULE 2: BUILD YOUR BUSINESS FOUNDATION

MODULE OVERVIEW: A solid foundation protects you, makes tax season less painful, and makes your business look professional from day one. In this module you'll choose a business name, understand your legal structure options (including LLCs), get an EIN, set up business banking and email, secure a domain, learn basic bookkeeping, understand deductible expenses, research licenses and permits, and keep your personal and business money separate.

In this module:

- Lesson 2.1: Choosing a Business Name
- Lesson 2.2: Understanding LLCs and Incorporation
- Lesson 2.3: EIN Basics
- Lesson 2.4: Business Banking
- Lesson 2.5: Business Email
- Lesson 2.6: Domain Names
- Lesson 2.7: Basic Bookkeeping
- Lesson 2.8: Understanding Business Expenses
- Lesson 2.9: Understanding Licenses and Permits
- Lesson 2.10: Separating Personal and Business Finances

LEGAL AND TAX NOTICE: This module provides general educational information about U.S. business basics. It is not legal, tax, or financial advice. Rules vary by state, county, city, and individual situation, and they change over time. Before making decisions, check official sources such as IRS.gov, SBA.gov, and your state's Secretary of State website, and consider speaking with a licensed attorney, CPA, or enrolled agent.

LESSON 2.1

Choosing a Business Name

The Big Idea

Your business name is often the first thing a customer sees. A good name is easy to say, easy to spell, easy to remember, and legally available. You don't need a perfect name; you need a clear, usable one that won't cause legal problems later.

What Makes a Good Business Name

- **Clear:** It hints at what you do or who you serve ("Bright Path Bookkeeping" is clearer than "Zentrix").
- **Simple:** Easy to spell after hearing it once. Avoid unusual spellings, hyphens, and numbers when possible.
- **Flexible:** Not so narrow that it traps you. "Austin iPhone Screen Repair" is hard to expand; "Austin Device Repair" leaves room.
- **Available:** Not already used by a similar business, with a matching domain and social handles available or close.
- **Legally safe:** Doesn't infringe on someone else's trademark.

Three Types of Names

1. **Descriptive:** says exactly what you do ("Fresh Start Home Cleaning"). Easy to understand; harder to trademark.
2. **Suggestive:** hints at a benefit ("Clear Ledger" for bookkeeping). A good balance for many small businesses.
3. **Invented or abstract:** a made-up word. Distinctive, but requires more marketing to explain.

How to Check Availability

1. **State business name search:** Most states let you search registered business names on the Secretary of State (or equivalent) website. If you form an LLC or corporation, your name usually must be distinguishable from existing entities in that state.
2. **Trademark search:** Search the U.S. Patent and Trademark Office database at USPTO.gov. Look for identical or confusingly similar names in related industries.
3. **Domain search:** Check whether a .com or another suitable domain is available (see Lesson 2.6).
4. **Social media handles:** Check the platforms you plan to use.
5. **Plain web search:** Search the name plus your industry and location.

> **NOTE:** A state business registration does not give you trademark rights across the country, and a domain registration doesn't either. If your brand becomes important to you, consider consulting a trademark attorney.

DBA ("Doing Business As")

If you operate under a name that isn't your legal name (for a sole proprietor) or your registered entity name (for an LLC), many states and counties require you to file a **DBA**, also called an assumed name, fictitious business name, or trade name. Example: Jane Smith operating as "Sunrise Pet Care" as a sole proprietor would generally need a DBA. Requirements and fees vary by location; SBA.gov has a guide under "Register your business."

> **EXAMPLE (HYPOTHETICAL):** Imagine a hypothetical dog-walking business. The founder brainstorms "Pawsome Walks," "Neighborhood Dog Walkers," and "Leash & Lead." She finds "Pawsome" used by dozens of pet businesses, which could cause confusion. "Leash & Lead" has no similar registered business in her state, no conflicting trademark she can find, and the domain is available with a small variation. She chooses it, then plans to confirm with her state's registration rules.

Step-by-Step: Choose Your Name

1. Brainstorm 20 names (use the AI prompt below to help).
2. Cut to 5 using the "clear, simple, flexible" test.
3. Say each one out loud to three people. Ask them to spell it.
4. Run availability checks: state database, USPTO, domain, social handles.
5. Choose your top name and a backup.

AI Prompt: Brainstorm Business Names

COPY-AND-PASTE AI PROMPT

```
I'm starting a business. Help me brainstorm names.
- What I do: [SERVICE/PRODUCT]
- Who I serve: [TARGET CUSTOMER]
- Location (if relevant): [CITY/STATE]
- Personality of the brand: [e.g., friendly, premium, bold, calm]
- Words or styles to avoid: [LIST]

Give me 25 names: 10 descriptive, 10 suggestive, 5 invented.
For each, give a one-line explanation and a possible .com domain.
Flag any names that seem likely to conflict with well-known brands.
Remind me to verify availability with my state and USPTO.gov.
```

AI Prompt: Evaluate My Shortlist

COPY-AND-PASTE AI PROMPT

```
Here are my top 5 business names: [LIST]
My business: [DESCRIPTION]
Evaluate each on: clarity, ease of spelling, memorability,
flexibility for future growth, and potential confusion with
existing brands. Rank them and explain your reasoning.
Do not claim any name is legally available; I will check that myself.
```

EXERCISE 2.1: Complete the "Name Availability Checklist" on your worksheet for your top three names.

LESSON 2.2

Understanding LLCs and Incorporation

The Big Idea

Your **business structure** affects your personal liability, your taxes, your paperwork, and how you can raise money. Beginners don't need to master every detail, but you should understand the basic options and the trade-offs. Many people start as sole proprietors and form an LLC once the business is active; others form an LLC from the start. Neither choice is universally "right."

The Main Business Structures

Sole proprietorship. The default if you do business alone and don't register an entity. There's usually no formation filing (though you may need a DBA, licenses, and permits). You and the business are legally the same, which means **you are personally responsible for business debts and liabilities.** Business profit is generally reported on your personal tax return (Schedule C).

General partnership. The default when two or more people do business together for profit without forming an entity. Partners generally share personal liability. A written partnership agreement is strongly recommended.

Limited Liability Company (LLC). A state-created entity formed by filing documents (often called Articles of Organization or a Certificate of Formation) with your state. An LLC can help separate your personal assets from business liabilities. It's flexible in how it's taxed.

Corporation (C corporation). A separate legal entity owned by shareholders. More formal requirements (bylaws, board, minutes) and the corporation pays its own income tax. Often chosen by businesses planning to raise investment from venture capital.

S corporation. Not a separate type of entity, but a **federal tax election** that an eligible corporation or LLC can make (IRS Form 2553). It can change how owners pay certain taxes. It has eligibility rules and added requirements like reasonable salary for owner-employees. Discuss with a tax professional before electing.

How an LLC Is Taxed (Federal Default Rules)

- **Single-member LLC:** By default, the IRS treats it as a "disregarded entity." Profits and losses are generally reported on the owner's personal return (Schedule C for most businesses), similar to a sole proprietorship.
- **Multi-member LLC:** By default, taxed as a partnership, which files an informational partnership return (Form 1065) and issues each member a Schedule K-1.
- **Elections:** An LLC can elect to be taxed as a corporation (Form 8832) or as an S corporation (Form 2553) if eligible.

Source: IRS.gov, "Limited Liability Company (LLC)." State tax treatment can differ.

What an LLC Does and Doesn't Do

It can:

- Help protect personal assets from business debts and lawsuits against the business, when properly maintained.
- Make your business look more established to some customers and partners.
- Provide flexibility in ownership and taxation.

It doesn't:

- Automatically lower your taxes. A default single-member LLC is generally taxed the same way as a sole proprietorship at the federal level.
- Protect you from your own personal wrongdoing or negligence.
- Protect you if you personally guarantee a loan or lease.
- Fully protect you if you mix personal and business funds or ignore formalities; courts can sometimes "pierce the corporate veil."
- Replace business insurance.

Common LLC Costs and Requirements

- **State filing fee** to form the LLC. Fees vary widely by state.
- **Annual or biennial report and fees** in many states. Some states also charge franchise taxes or minimum taxes (for example, California generally imposes an annual minimum franchise tax on LLCs doing business there). Check your state.
- **Registered agent:** A person or company with a physical address in the state who accepts legal documents for the LLC. You can often be your own registered agent if you have an in-state address and are available during business hours.
- **Operating agreement:** An internal document describing ownership and how the LLC runs. Not every state requires one, but it's strongly recommended, even for a single-member LLC.
- **Publication requirements:** A few states require newly formed LLCs to publish a notice in newspapers.
- **Federal reporting rules:** Beneficial ownership information (BOI) reporting rules from FinCEN changed several times in 2024 and 2025. Check FinCEN.gov for the current requirements that apply to your company.

How to Form an LLC (General Steps)

1. Choose and check your name (Lesson 2.1) against your state's database.
2. Choose a registered agent.
3. File Articles of Organization (or the equivalent) with your state, usually online through the Secretary of State website, and pay the fee.
4. Create an operating agreement.

5. Get an EIN from the IRS (Lesson 2.3).
6. Open a business bank account (Lesson 2.4).
7. Register for state taxes and obtain licenses and permits as needed (Lesson 2.9).
8. Calendar your annual report deadline.

IMPORTANT: You can usually file an LLC directly with your state yourself. Third-party formation services are optional and charge additional fees. Some mail official-looking solicitations offering "compliance" services. Always verify that a notice comes from your actual state agency before paying.

Do You Need an LLC Right Now?

Questions to consider (and discuss with a professional):

- Does your business involve physical risk (e.g., working in clients' homes, handling pets, events) or significant contracts?
- Do you have personal assets you want to protect?
- Can you afford the formation and ongoing state fees?
- Would general liability or professional liability insurance address much of your risk?

EXAMPLE (HYPOTHETICAL): A hypothetical freelance writer testing her first few projects might begin as a sole proprietor with a DBA and a separate bank account, then form an LLC once she has steady clients. A hypothetical mobile pet-grooming business, which works with animals in customers' homes, might decide to form an LLC and buy insurance before taking the first appointment because the liability risk is higher from day one. Both are reasonable choices depending on risk and budget.

AI Prompt: Understand Structure Options

COPY-AND-PASTE AI PROMPT

```
I'm a beginner starting a [TYPE OF BUSINESS] in [STATE].
Explain, in plain language, the differences between a sole
proprietorship, a single-member LLC, and an S corporation election
for my situation. Include: liability, federal tax treatment,
typical paperwork, and ongoing state requirements to look up.
Give me a list of questions to ask a CPA or attorney.
Clearly state that I must verify details on my state's official
website and IRS.gov, and that this is not legal or tax advice.
```

AI Prompt: Draft an Operating Agreement Checklist

COPY-AND-PASTE AI PROMPT

I'm forming a single-member LLC in [STATE]. Create a checklist of topics an operating agreement typically covers (ownership, management, capital contributions, distributions, what happens if I die or become incapacitated, dissolution, etc.). For each topic, explain it in one sentence. Don't write the agreement itself; I'll use an attorney or my state's resources for that.

EXERCISE 2.2: Complete the "Business Structure Decision" section of your worksheet. Look up your state's LLC filing fee, annual report requirement, and registered agent rules on the official state website, and record them.

LESSON 2.3

EIN Basics

The Big Idea

An **Employer Identification Number (EIN)** is a nine-digit number the IRS assigns to identify a business for tax purposes. Think of it as a Social Security number for your business. Despite the name, you don't need employees to get one.

Who Needs an EIN?

According to IRS guidance, you generally need an EIN if your business:

- Has employees.
- Operates as a corporation or partnership (including a multi-member LLC taxed as a partnership).
- Files certain employment, excise, or alcohol/tobacco/firearms tax returns.
- Has a Keogh retirement plan, or meets other criteria listed on IRS.gov.

A sole proprietor or single-member LLC **with no employees** and no excise tax obligations may not be required to have an EIN for federal tax purposes and can often use their SSN. However, many people get one anyway because:

- Banks often require an EIN to open an LLC business account.
- You can give clients an EIN on Form W-9 instead of your Social Security number, which reduces identity-theft risk.
- It makes the business look more established.

Check the IRS's "Do You Need an EIN?" page for the current rules.

How to Get an EIN (Free)

1. Go to **IRS.gov** and search "Apply for an EIN online."
2. Confirm you're on the official IRS.gov site. **The IRS does not charge a fee for an EIN.** Many third-party websites look official and charge for this free service.
3. Complete the online application. You'll need the "responsible party's" SSN or ITIN, the business name, address, structure, and reason for applying.
4. If eligible for the online application, you typically receive the EIN immediately at the end of the session. Download and save the confirmation notice (CP 575) as a PDF.
5. Alternatives include applying by fax or mail with Form SS-4.

After You Get Your EIN

- Store the confirmation letter securely. You'll need it for banking and sometimes for state registrations.
- Use the EIN on your W-9 forms, business bank account, and tax filings as applicable.

- An EIN doesn't register you for state taxes. You may need a separate state tax ID (for example, for sales tax or state payroll).

> **EXAMPLE (HYPOTHETICAL):** A hypothetical single-member LLC offering virtual assistant services forms in its state, then visits IRS.gov to apply for an EIN online. It isn't technically required for her federal taxes because she has no employees, but her bank requires it to open the LLC's account, and she prefers not to share her SSN with clients on W-9 forms.

AI Prompt: Prepare for the EIN Application

COPY-AND-PASTE AI PROMPT

I'm about to apply for an EIN on IRS.gov for a [STRUCTURE, e.g., single-member LLC] that [WHAT THE BUSINESS DOES] in [STATE]. Make a checklist of the information I should have ready before starting the application, and explain each term I'll see (responsible party, legal name vs. trade name, reason for applying, principal activity). Remind me the EIN is free on IRS.gov.

> **EXERCISE 2.3:** Use the worksheet's "EIN Readiness" checklist. Decide whether you need an EIN now and record where you'll store the confirmation letter.

LESSON 2.4

Business Banking

The Big Idea

A **dedicated business bank account** is one of the simplest and most important steps you can take. It makes bookkeeping easier, supports your liability protection if you have an LLC, makes tax time simpler, and looks more professional to clients.

Types of Accounts

- **Business checking:** Your main operating account. Receive payments, pay expenses.
- **Business savings:** Set aside money for taxes and emergencies.
- **Business credit card (optional):** Can help separate expenses and build business credit. Use carefully; avoid carrying high-interest balances.

What to Compare

Factor	Questions to ask
Fees	Monthly fees? Can they be waived? Transaction or deposit limits?
Minimums	Minimum opening deposit or balance?
Integrations	Does it connect to your bookkeeping software and payment processors?
Access	Online/mobile banking quality? Branches or ATMs if you handle cash?
Deposit insurance	Is the bank FDIC-insured (or the credit union NCUA-insured)? If it's a fintech app, which partner bank holds the deposits?
Support	Can you reach a human when needed?

FDIC deposit insurance generally covers up to $250,000 per depositor, per insured bank, per ownership category. Verify details at FDIC.gov.

What You'll Typically Need

Requirements vary by bank, but often include:

- Government-issued photo ID.
- EIN (or SSN for some sole proprietors).
- Formation documents (Articles of Organization) for an LLC or corporation.
- Operating agreement (some banks ask for it).
- DBA certificate if you use a trade name.

- Business license, if applicable.

The Tax Savings Habit

If you're self-employed, taxes are not automatically withheld from your business income. A common practice is to move a fixed percentage of every payment into a separate savings account for taxes. The right percentage depends on your income, state, and deductions; a tax professional can help you choose. Self-employed people generally pay self-employment tax (Social Security and Medicare, 15.3% on net earnings up to applicable limits) in addition to income tax, and may need to make quarterly estimated tax payments (see IRS.gov, "Estimated Taxes," and Form 1040-ES).

> **EXAMPLE (HYPOTHETICAL):** A hypothetical home-organizing business opens a business checking account and a business savings account at the same bank. Every time a client pays, the owner transfers a set percentage, which she chose with her tax preparer, into the savings account labeled "TAXES — DO NOT TOUCH."

Step-by-Step: Open Your Business Account

1. Gather your documents (see list above).
2. Compare at least three options using the table.
3. Open business checking (and savings if possible).
4. Connect your payment processor to deposit into the business account.
5. Set up your tax savings transfer habit.

AI Prompt: Compare Bank Accounts

COPY-AND-PASTE AI PROMPT

```
I'm comparing business bank accounts for a [STRUCTURE] doing
[BUSINESS TYPE], expecting about [NUMBER] transactions per month,
[YES/NO] cash deposits, and using [PAYMENT TOOLS, e.g., Stripe,
Square, PayPal]. Here are the details I found for three accounts:
[PASTE FEES, MINIMUMS, FEATURES FROM EACH BANK'S WEBSITE]
Compare them in a table and recommend which fits my needs, explaining
trade-offs. Only use the information I provided.
```

> **EXERCISE 2.4:** Fill out the "Bank Comparison" table on your worksheet for three options.

LESSON 2.5

Business Email

The Big Idea

An email address like **hello@yourbusiness.com** looks more trustworthy than a free personal address, and it keeps business communication organized and separate.

How Business Email Works

A custom-domain email requires:

1. **A domain name** you own (Lesson 2.6).
2. **An email hosting provider** such as Google Workspace, Microsoft 365, Zoho Mail, or email included with some hosting plans.
3. **DNS records** that connect your domain to the email provider (usually MX records, plus SPF, DKIM, and DMARC records to improve deliverability and reduce spoofing). Most providers include step-by-step setup guides.

Smart Address Choices

- **hello@** or **contact@**: friendly general inbox.
- **yourname@**: personal and direct for sales conversations.
- **support@**: customer service (can be an alias that forwards to your main inbox).
- **billing@** or **invoices@**: payments and receipts.

Many providers let you create **aliases** for free, so one inbox can receive mail for several addresses.

Email Professionalism Basics

- Add a simple signature: name, title, business, website, and phone (optional).
- Respond within a set time (for example, one business day) and say so on your contact page.
- Use templates for common replies (Module 3 shows you how to create them with AI).
- For marketing emails, follow the CAN-SPAM Act: don't use deceptive subject lines, identify the message as an ad where required, include your valid physical postal address, give a clear way to opt out, and honor opt-outs promptly. See FTC.gov's "CAN-SPAM Act: A Compliance Guide for Business."

Step-by-Step: Set Up Business Email

1. Buy your domain (Lesson 2.6).
2. Choose an email provider and plan.
3. Follow the provider's guide to verify your domain and add MX records.
4. Add SPF, DKIM, and DMARC records as instructed.

5. Create your main address and aliases.
6. Set up your signature and connect the inbox to your phone.
7. Send test emails to and from a personal account to confirm delivery.

AI Prompt: Create Email Templates

COPY-AND-PASTE AI PROMPT

```
I run [BUSINESS] serving [CUSTOMER]. Write 6 short, friendly,
professional email templates I can reuse:
1. Reply to a new inquiry
2. Sending a quote
3. Following up on a quote after 3 days
4. Booking confirmation
5. Thank-you after the job, with a review request
6. Politely declining a project that isn't a fit
Use [PLACEHOLDERS] for names, dates, and prices. Keep each under 120 words.
```

AI Prompt: Write My Email Signature

COPY-AND-PASTE AI PROMPT

```
Write 3 professional email signature options for:
Name: [NAME], Title: [TITLE], Business: [BUSINESS], Website: [URL],
Phone: [OPTIONAL]. One minimal, one with a short tagline, and one
with a booking link line. Plain text, under 5 lines each.
```

EXERCISE 2.5: Choose your email provider and record your planned addresses and aliases on the worksheet.

LESSON 2.6

Domain Names

The Big Idea

A **domain name** (like yourbusiness.com) is your address on the internet. You register it through a **domain registrar** for an annual fee. Your domain powers your website and your business email.

Choosing a Good Domain

- **Match your business name** as closely as possible.
- **Prefer .com** when available because many people type it by default. Other good options include .co, .net, or industry extensions (.studio, .shop), but be aware customers might mistype them.
- **Keep it short** and easy to spell. Avoid hyphens and numbers.
- **Consider adding a word** if your exact name is taken: get[name].com, [name]hq.com, [name][city].com.
- **Check for trademark conflicts.** Registering a domain doesn't give you the right to use a protected brand name.

Registrar Basics

- Compare first-year and **renewal** prices; promotional first-year prices often renew higher.
- Look for **WHOIS privacy** (often free) to keep your personal contact info out of public records.
- Turn on **auto-renew** and **two-factor authentication.** Losing a domain because a card expired is a painful, avoidable problem.
- Register the domain in **your own account** (or your business's), not a designer's or contractor's. You should always control your domain.

Step-by-Step: Register Your Domain

1. Brainstorm 5–10 domain variations.
2. Check availability at a registrar.
3. Compare first-year and renewal pricing at two registrars.
4. Purchase for at least one year; consider multiple years if you're committed.
5. Enable WHOIS privacy, auto-renew, and two-factor authentication.
6. Record your registrar, login email, and renewal date in a secure place (a password manager is ideal).

> **EXAMPLE (HYPOTHETICAL):** A hypothetical bookkeeping business named "Clear Ledger" finds clearledger.com taken. It considers clearledgerbooks.com, getclearledger.com, and clearledgeraz.com (for Arizona). It chooses clearledgerbooks.com because it describes the service and is easy to say aloud.

AI Prompt: Generate Domain Ideas

COPY-AND-PASTE AI PROMPT

My business name is [NAME] and I offer [SERVICE] in [LOCATION/online]. The exact .com is taken. Suggest 20 alternative domain ideas that are short, easy to spell, and avoid hyphens and numbers. Group them into: name + keyword, name + location, prefix/suffix variations, and alternative extensions. I'll check availability myself.

EXERCISE 2.6: List five domain options on your worksheet, check availability, and record your final choice and renewal date.

LESSON 2.7

Basic Bookkeeping

The Big Idea

Bookkeeping is recording every dollar that comes into and goes out of your business. It's not glamorous, but it's how you know whether your business is actually working, how you prepare for taxes, and how you protect yourself if the IRS ever asks questions.

Key Terms

- **Revenue (income):** money earned from sales.
- **Expenses:** costs of running the business.
- **Profit (net income):** revenue minus expenses.
- **Cash basis accounting:** record income when you receive it and expenses when you pay them. Most small businesses start here.
- **Accrual basis accounting:** record income when earned and expenses when incurred, regardless of when cash moves.
- **Receipts and records:** evidence of each transaction (invoices, receipts, bank statements).
- **Chart of accounts:** the list of categories you use to organize transactions (e.g., Advertising, Software, Supplies, Contract Labor).

Three Ways to Keep Books

1. **Spreadsheet:** free and simple for very small businesses. Requires discipline.
2. **Bookkeeping software:** connects to your bank and categorizes transactions; many options have small-business plans.
3. **Bookkeeper:** a professional handles it for you, typically monthly.

Your Weekly 20-Minute Bookkeeping Routine

1. Download or sync the week's transactions from your business bank account and payment processors.
2. Categorize each transaction.
3. Attach or file the receipt (photo, PDF, or email).
4. Note anything unusual (refunds, owner contributions, transfers).
5. Check for unpaid invoices and follow up.

Monthly Routine

1. **Reconcile:** confirm your records match your bank statement.
2. Review a simple **profit and loss** summary.

3. Move your tax savings (Lesson 2.4).
4. Review subscriptions and cancel unused ones.

How Long to Keep Records

The IRS generally says to keep records that support income and deductions for at least three years, with longer periods in certain situations (for example, employment tax records and some property records). See IRS.gov, "How long should I keep records?" and IRS Publication 583, *Starting a Business and Keeping Records.*

A Simple Spreadsheet Layout

Date	Description	Category	Income	Expense	Payment method	Receipt saved?
03/02	Client A — website edits	Service income	300.00		Stripe	Yes
03/03	Design software subscription	Software		15.00	Business card	Yes

(The amounts above are placeholders for illustration only.)

> **EXAMPLE (HYPOTHETICAL):** A hypothetical candle maker sells at weekend markets and online. Every Sunday evening, she spends 20 minutes categorizing that week's transactions and snapping photos of paper receipts. At tax time, her preparer receives a clean profit and loss summary rather than a shoebox of receipts.

AI Prompt: Build a Bookkeeping Spreadsheet

COPY-AND-PASTE AI PROMPT

```
Create a simple bookkeeping spreadsheet structure for a [BUSINESS TYPE]
using cash-basis accounting. Include:
- A transactions tab (columns and example categories)
- A suggested chart of accounts for my type of business
- A monthly summary tab with formulas for total income, total expenses,
  and net profit by category (give formulas for Google Sheets)
- A tax savings tab that calculates a set-aside at [X]% of income
Explain how to use it weekly in 5 steps.
```

AI Prompt: Categorize Transactions

COPY-AND-PASTE AI PROMPT

Here is a list of my business transactions for the month:
[PASTE DATE, DESCRIPTION, AMOUNT]
Suggest a bookkeeping category for each one using common small-business categories. Flag anything that might be personal, unclear, or need a receipt. Do not give tax advice; mark items I should ask my tax professional about.

EXERCISE 2.7: Set up your bookkeeping method (spreadsheet or software) and schedule your weekly 20-minute bookkeeping block.

LESSON 2.8

Understanding Business Expenses

The Big Idea

Business expenses reduce your taxable profit, but only legitimate business expenses with proper records. The IRS generally allows deductions for expenses that are both **ordinary** (common and accepted in your industry) and **necessary** (helpful and appropriate for your business).

Common Categories of Small Business Expenses

- Advertising and marketing
- Software and subscriptions
- Website, domain, and hosting costs
- Office supplies
- Contract labor (payments to freelancers)
- Professional fees (legal, accounting)
- Business insurance
- Education directly related to your current business (rules apply)
- Business use of a vehicle (with mileage or expense records)
- Equipment (may be deducted or depreciated depending on rules)
- Merchant/payment processing fees
- Business travel (rules apply)
- Business meals (generally limited, often 50%, with exceptions; check current rules)

Special Topics to Know About

Home office. If you use part of your home **regularly and exclusively** for business, you may qualify for a home office deduction. The IRS offers a simplified method based on square footage (with a cap) or the regular method based on actual expenses. See IRS Publication 587.

Startup costs. Costs incurred before your business begins operating may be treated differently. Under current federal rules, you may be able to deduct up to $5,000 of startup costs in your first year (reduced if total startup costs exceed $50,000), with the rest amortized over 180 months. Confirm details with a tax professional.

Mixed-use items. If something is used for both personal and business purposes (like a phone or vehicle), generally only the business-use portion may be deductible. Keep records showing how you calculated the business percentage.

Personal expenses are not deductible. Clothing you could wear outside work, personal meals, and family vacations generally don't qualify, even if you discuss business.

Payments to contractors. If you pay contractors for services, you may need to collect Form W-9 and issue Form 1099-NEC if payments meet the IRS reporting threshold. The threshold has changed for recent tax years, so check IRS.gov for the current amount.

Documentation Is Everything

For each expense, keep: date, amount, who you paid, what it was for, and how it relates to the business. A bank statement alone may not show the business purpose. Write a short note.

TAX NOTICE: Tax rules are complex and change. This lesson explains general concepts only. Use IRS Publication 334 (*Tax Guide for Small Business*), the "Deducting business expenses" guidance on IRS.gov, and a qualified tax professional for your situation.

EXAMPLE (HYPOTHETICAL): A hypothetical freelance photographer buys a new camera lens, pays for photo-editing software, and drives to client shoots. She saves the lens receipt with a note about its business use, keeps the software subscription on her business card, and logs mileage with a mileage app. She does not deduct her family's streaming subscription, even though she occasionally watches photography documentaries.

AI Prompt: Expense Questions for My Tax Pro

COPY-AND-PASTE AI PROMPT

```
I run a [BUSINESS TYPE] as a [STRUCTURE] in [STATE]. Here are expenses
I'm unsure about: [LIST]. For each one, explain in general terms what
rules usually apply (ordinary and necessary, business-use percentage,
documentation needed) and write a clear question I should ask my tax
professional. Do not tell me definitively whether it's deductible.
```

EXERCISE 2.8: Fill in the "Expected Business Expenses" table on your worksheet with your likely monthly expenses and the records you'll keep for each.

LESSON 2.9

Understanding Licenses and Permits

The Big Idea

Depending on what you do and where you do it, you may need one or more **licenses or permits** from federal, state, county, or city agencies. Online businesses aren't automatically exempt. Requirements depend on your industry, location, and activities.

Common Types

- **General business license:** Many cities and counties require one to operate within their limits, including some home-based businesses.
- **Home occupation permit:** Some localities require one if you run a business from your home, especially if clients visit.
- **Seller's permit / sales tax permit:** Many states require one if you sell taxable goods (and in some states, certain services or digital products).
- **Professional or occupational licenses:** Required for regulated professions (e.g., cosmetology, contracting, real estate, accounting, some health services).
- **Health permits:** Food businesses typically need them. Many states have "cottage food" laws with specific rules for selling certain homemade foods.
- **Federal licenses:** Required for certain activities, like selling alcohol, firearms, or transportation services. See SBA.gov's "Apply for licenses and permits."

Sales Tax in Brief

Sales tax is handled at the state (and sometimes local) level. Since the U.S. Supreme Court's 2018 *South Dakota v. Wayfair* decision, many states require sellers to collect sales tax once they pass certain sales thresholds in that state ("economic nexus"), even without a physical presence. Many marketplaces (like Etsy or Amazon) collect and remit sales tax on behalf of sellers under "marketplace facilitator" laws in many states. Check your state's department of revenue.

How to Find Your Requirements

1. Visit **SBA.gov** and search "Apply for licenses and permits."
2. Visit your **state's** business portal or Secretary of State website.
3. Check your **county** and **city** websites, or call the city clerk or business licensing office.
4. Check your **state department of revenue** for sales tax registration.
5. Ask your local **Small Business Development Center (SBDC)** or **SCORE** mentor (free resources).
6. If you're in a regulated profession, check the relevant state licensing board.
7. If you rent or live in an HOA, check your lease or HOA rules for home business restrictions.

EXAMPLE (HYPOTHETICAL): A hypothetical home bakery owner checks her state's cottage food law and finds that certain baked goods are allowed with labeling rules and sales limits, while items requiring refrigeration are not. Her city also requires a general business license. She records both requirements, their renewal dates, and the agency phone numbers in her worksheet.

AI Prompt: Build a Licensing Research Checklist

COPY-AND-PASTE AI PROMPT

I'm starting a [BUSINESS TYPE] in [CITY, COUNTY, STATE], operating [from home / online / at client locations]. Create a research checklist of licenses, permits, and registrations I should investigate at the federal, state, county, and city levels.
For each, tell me what type of agency usually handles it and what question to ask them. Do not state final requirements; tell me to verify with official government sources.

LEGAL NOTICE: Not legal advice. Licensing rules vary significantly by location and industry. Always confirm with the official agency.

EXERCISE 2.9: Complete the "Licenses and Permits Research" table on your worksheet, including agency, link, cost, and renewal date for each item.

LESSON 2.10

Separating Personal and Business Finances

The Big Idea

Mixing personal and business money ("commingling") is one of the most common beginner mistakes. It makes bookkeeping confusing, makes tax preparation harder, can weaken an LLC's liability protection, and hides the truth about whether your business is profitable.

The Separation Rules

1. **All business income goes into the business account.** Every payment, every platform payout.
2. **All business expenses are paid from the business account or business card.**
3. **Don't pay personal expenses from the business account.** If you need money for yourself, transfer it as an **owner's draw** (sole proprietors and most LLC owners) or salary (if structured as an S corp or C corp, per your tax professional), and record it.
4. **If you use personal money for the business, record it** as an owner's contribution, or reimburse yourself with documentation.
5. **Keep business payment accounts (PayPal, Stripe, Square) linked to the business bank account.**

Paying Yourself

For a sole proprietor or default single-member LLC, the business's profit is generally your taxable income whether you withdraw it or not. Owner's draws are not a business expense; they're a transfer to you. A simple approach many owners use:

1. Pay business expenses.
2. Set aside taxes.
3. Keep a cash cushion for the business.
4. Transfer a consistent owner's draw on a schedule (e.g., monthly).

Protecting Your Separation

- Use separate logins and payment methods for business software.
- Label everything clearly ("Business," "Tax Savings," "Personal").
- Never use business funds for personal purchases "just this once."
- If a mistake happens, record it and fix it promptly.

EXAMPLE (HYPOTHETICAL): A hypothetical tutoring business owner had been receiving payments to her personal payment app. She updates her settings so all tutoring payments go to a business payment account linked to her business checking. On the first of each month, she pays herself a fixed owner's draw and records it in her books.

AI Prompt: Create My Money Flow System

COPY-AND-PASTE AI PROMPT

Design a simple money-flow system for my [BUSINESS TYPE] as a [STRUCTURE]. I receive payments through [PAYMENT METHODS] and pay expenses like [LIST]. Show:
- Which accounts I need (business checking, tax savings, etc.)
- Where every payment and expense should flow
- A monthly routine for paying myself and setting aside taxes
- How to record owner's draws and contributions
Present it as a step-by-step checklist. Remind me to confirm tax questions with a professional.

EXERCISE 2.10: Draw or describe your money flow on your worksheet and set a recurring date for owner's draws and tax savings transfers.

MODULE 2

Module 2 Worksheet

Not legal or tax advice. Verify every requirement with official sources for your state and locality.

Part A: Name Availability Checklist

Name option	State database clear?	USPTO search clear?	Domain available?	Social handles?	Notes

Final name: _____ Backup name: _____ DBA needed? Yes / No

Part B: Business Structure Decision

Item	My answer / research
Structure I'm starting with	
Why this structure fits now	
State LLC filing fee (if forming)	
Annual report / fees in my state	
Registered agent plan	
Operating agreement plan	
Questions for a CPA or attorney	

Part C: EIN Readiness

- [ ] I checked "Do You Need an EIN?" on IRS.gov
- [ ] I'm using only the official IRS.gov site (EINs are free)
- [ ] I know my responsible party, legal name, and structure
- [ ] I saved my EIN confirmation letter securely

Where I store important documents: _____

Part D: Bank Comparison

Bank / account	Monthly fee	Minimums	Integrations	Insured?	Notes

Tax savings percentage (chosen with tax pro): _____%

Part E: Email and Domain

Item	Decision
Domain options (5)	
Final domain	
Registrar and renewal date	
Email provider	
Main address and aliases	

Part F: Expected Business Expenses

Expense	Est. monthly cost	Category	Record I'll keep

Part G: Licenses and Permits Research

License / permit	Agency	Website or phone	Cost	Renewal date	Status

Part H: My Money Flow

Payments come in through: _____ into _____

Tax savings transfer: _____% on _____ (day)

Owner's draw date: _____ Weekly bookkeeping time: _____

MODULE 2

Action Checklist

- [ ] Choose a business name and a backup, and run availability checks
- [ ] File a DBA if required
- [ ] Decide on your business structure (and form an LLC if chosen)
- [ ] Get an EIN from IRS.gov if needed or wanted (it's free)
- [ ] Open a business checking account (and tax savings account)
- [ ] Register your domain with auto-renew, privacy, and two-factor authentication
- [ ] Set up business email with at least one professional address
- [ ] Choose a bookkeeping method and schedule a weekly bookkeeping block
- [ ] List expected expenses and how you'll document them
- [ ] Research and apply for required licenses and permits
- [ ] Route all business income and expenses through business accounts
- [ ] Book a consultation with a tax professional or SBDC advisor (optional but recommended)

MODULE 2

Knowledge Check

1. By default, how does the IRS generally treat a single-member LLC for federal income tax?
A) As a C corporation
B) As a disregarded entity, with income usually reported on the owner's return
C) As a nonprofit
D) As a partnership

2. How much does the IRS charge for an EIN?
A) $50
B) $99
C) Nothing; it's free on IRS.gov
D) It depends on the state

3. Which statement about LLCs is true?
A) An LLC always lowers your taxes
B) An LLC protects you from your own negligence
C) Mixing personal and business funds can weaken liability protection
D) An LLC replaces the need for insurance

4. What does "DBA" stand for and when is it often needed?
A) "Domain Business Address"; when you buy a domain
B) "Doing Business As"; when operating under a name other than your legal or entity name
C) "Direct Bank Account"; when opening a bank account
D) "Digital Business Authorization"; when selling online

5. Which two tests does the IRS use for deductible business expenses?
A) Cheap and fast
B) Ordinary and necessary
C) Approved and filed
D) Personal and business

6. True or false: Running an online business means you never need a local license.

7. Which marketing email practice is required by the CAN-SPAM Act?
A) Sending at least weekly
B) Including a clear way to opt out and honoring opt-outs
C) Using emojis in subject lines
D) Only emailing customers in your state

8. What is the best way to pay yourself as a sole proprietor?

A) Pay personal bills directly from the business account

B) Record a regular owner's draw transferred to your personal account

C) Never take money out

D) Use the tax savings account

MODULE 2

Answer Key

1. **B.** A single-member LLC is a disregarded entity by default unless it elects otherwise.
2. **C.** EINs are free from the IRS. Beware of sites that charge for them.
3. **C.** Commingling funds can weaken liability protection. LLCs don't automatically reduce taxes or replace insurance.
4. **B.** A DBA is a "doing business as" or assumed-name registration.
5. **B.** Expenses generally must be ordinary and necessary for your business.
6. **False.** Many localities and states require licenses or registrations regardless of whether you sell online.
7. **B.** CAN-SPAM requires a clear opt-out mechanism and prompt honoring of opt-outs, among other rules.
8. **B.** Transfer and record an owner's draw; keep personal expenses out of the business account.

MODULE

03

AI IS YOUR NEW BUSINESS PARTNER

3.1 Understanding Generative AI

3.2 Using ChatGPT Effectively

3.3 Creating AI Business Assistants

3.4 Writing Powerful Prompts

3.5 Automating Repetitive Tasks

3.6 AI Customer Service

3.7 AI Content Generation

3.8 AI Market Research

3.9 Building Efficient Business Workflows

MODULE 3: AI IS YOUR NEW BUSINESS PARTNER

MODULE OVERVIEW: Generative AI tools can help a solo founder research, write, plan, and organize work that used to require a team. They can also produce confident nonsense. This module teaches you how these tools work, how to use ChatGPT and similar assistants effectively, how to build reusable AI business assistants, how to write strong prompts, and how to apply AI to repetitive tasks, customer service, content, market research, and day-to-day workflows. It includes more than 25 copy-and-paste prompts.

In this module:

- Lesson 3.1: Understanding Generative AI
- Lesson 3.2: Using ChatGPT Effectively
- Lesson 3.3: Creating AI Business Assistants
- Lesson 3.4: Writing Powerful Prompts
- Lesson 3.5: Automating Repetitive Tasks
- Lesson 3.6: AI Customer Service
- Lesson 3.7: AI Content Generation
- Lesson 3.8: AI Market Research
- Lesson 3.9: Building Efficient Business Workflows

> **NOTE:** AI products change quickly. Feature names, prices, and limits mentioned anywhere in this module may differ by the time you read it. The principles (clear instructions, good context, human review) stay the same. Tool names are mentioned as examples, not endorsements.

LESSON 3.1

Understanding Generative AI

The Big Idea

Generative AI refers to software that creates new content (text, images, audio, video, code) based on patterns learned from large amounts of data. Tools like ChatGPT, Claude, Gemini, and Microsoft Copilot are built on **large language models (LLMs)**. You type an instruction (a **prompt**), and the model generates a response.

How It Works, in Plain English

An LLM is trained on enormous amounts of text to predict likely next words. That training gives it a broad, flexible ability to summarize, rewrite, brainstorm, explain, and format information. It doesn't "know" things the way a person does, and it doesn't automatically check facts. It produces text that *sounds* right based on patterns, which is usually useful and sometimes wrong.

What AI Is Great At

- **Drafting:** first versions of emails, posts, product descriptions, outlines.
- **Rewriting:** making text shorter, clearer, friendlier, or more professional.
- **Brainstorming:** names, ideas, angles, objections, questions.
- **Summarizing:** long documents, meeting notes, reviews.
- **Structuring:** turning messy notes into checklists, tables, SOPs, plans.
- **Explaining:** breaking down unfamiliar topics in simple language.
- **Role-play:** practicing sales calls or customer conversations.

Where AI Falls Short

- **Hallucinations:** AI can invent facts, statistics, quotes, laws, and sources that look real. Always verify anything factual, especially numbers, legal rules, and citations.
- **Outdated information:** Models have training cutoffs. Some tools can browse the web, but you still need to check sources.
- **Generic output:** Without context, AI produces bland, average content.
- **Judgment:** AI can't take responsibility for business decisions. You do.

Using AI Responsibly

1. **Protect private data.** Don't paste customer personal data, passwords, financial account numbers, or confidential client information into tools unless you understand and accept the tool's data policies. Check settings for whether your conversations are used for training.
2. **Review everything before publishing.** You're responsible for what goes out under your name.

3. **Be honest.** Don't use AI to create fake reviews, fake testimonials, or misleading claims. The FTC has rules against fake reviews and testimonials.
4. **Respect copyrights and trademarks.** Don't ask AI to reproduce someone else's protected work, and review generated images for logos or likenesses.
5. **Disclose when appropriate.** Some platforms and situations call for disclosure of AI-generated content.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical life coach asks an AI tool for "statistics about burnout" for a blog post. The tool returns three specific-sounding percentages with study names. When she searches for the studies, she can't find two of them. She removes them and uses only a statistic she can trace to an original published source. Lesson learned: AI drafts, humans verify.

AI Prompt: Explain AI Limits for My Business

COPY-AND-PASTE AI PROMPT

```
I run (or am starting) a [BUSINESS TYPE]. Explain in plain language:
1. Ten specific ways AI could save me time in this business
2. Five tasks where I should NOT rely on AI without careful review
3. What information I should never paste into an AI tool
Keep it practical and specific to my business.
```

> **EXERCISE 3.1:** On your worksheet, list five tasks in your business where AI could help and three tasks where you'll require human review.

LESSON 3.2

Using ChatGPT Effectively

The Big Idea

Most people use ChatGPT (or any AI assistant) like a search engine: one short question, one answer. You'll get far better results treating it like a **capable new assistant**: give context, explain the goal, show examples, and iterate.

The Conversation Mindset

1. **Start with context.** Who are you, what's your business, who's the customer?
2. **Give a clear task.** What exactly do you want produced?
3. **Specify the format.** Table, bullet list, email, 150 words, three options.
4. **Review and refine.** "Make it shorter." "More casual." "Option 2, but with a stronger opening."
5. **Ask it to ask you questions.** "Before you write, ask me any questions you need answered."

Useful Features to Explore

Features vary by product and plan, but commonly include:

- **Custom instructions / memory:** set standing information about you and your business so you don't repeat it.
- **File uploads:** analyze documents, spreadsheets, and PDFs.
- **Web browsing:** find current information (still verify sources).
- **Image generation:** create concept images, social graphics, and mockups.
- **Projects or custom assistants:** organize chats and instructions around a topic (Lesson 3.3).
- **Voice mode:** talk through ideas while walking or driving.

Iteration Phrases That Work

- "Give me 5 different versions with different tones."
- "What's weak about this draft? Then fix it."
- "Rewrite this for a 7th-grade reading level."
- "Make it 40% shorter without losing the key points."
- "Turn this into a checklist."
- "What questions would a skeptical customer ask after reading this?"
- "Continue, but keep the same format."

EXAMPLE (HYPOTHETICAL): A hypothetical lawn-care business owner types "write a flyer." The result is generic. He tries again: "I run a two-person lawn-care business in a suburban neighborhood. Write a half-page flyer for busy homeowners offering weekly mowing and edging. Friendly tone, include a clear call to text for a free quote, and leave a placeholder for the phone number. Give me 3 headline options." The second result is far more useful because he provided context, audience, format, and a call to action.

AI Prompt: Set Up Custom Instructions

COPY-AND-PASTE AI PROMPT

```
Help me write custom instructions for my AI assistant so it
understands my business. Ask me 10 questions about my business,
customers, offers, brand voice, and goals, one at a time. Then
write two short paragraphs:
1. "What the assistant should know about me and my business"
2. "How the assistant should respond" (tone, format, length,
   and a rule to flag uncertain facts instead of guessing)
```

AI Prompt: The "Interview Me First" Starter

COPY-AND-PASTE AI PROMPT

```
I need help with [TASK]. Before you write anything, ask me up to 7
questions that would help you do this well. Ask them all at once in
a numbered list. After I answer, produce the result, then suggest
two ways to improve it.
```

EXERCISE 3.2: Write your custom instructions using the prompt above and save them on your worksheet.

LESSON 3.3

Creating AI Business Assistants

The Big Idea

Instead of starting from scratch every time, you can build **reusable AI assistants**: saved instructions plus reference documents that make the AI behave consistently for a specific job. Depending on the tool, this might be a Custom GPT, a Project with instructions, a Claude Project, a Gem, or simply a saved "master prompt" document you paste at the start of a chat.

The Anatomy of a Business Assistant

1. **Role:** what job the assistant performs ("You are my customer email assistant").
2. **Context:** business details, offers, prices, policies, tone of voice.
3. **Rules:** what to always do and never do ("Never promise refunds beyond our policy," "Never invent facts; say 'I need to confirm' instead").
4. **Process:** steps to follow ("Ask for the customer's order number first").
5. **Output format:** structure, length, sign-off.
6. **Knowledge files:** FAQ, price list, policies, brand guide (no sensitive customer data).

Five Starter Assistants for a New Business

1. **Content Assistant:** turns your ideas into posts, captions, and emails in your voice.
2. **Customer Reply Assistant:** drafts replies to inquiries using your FAQ and policies.
3. **Research Assistant:** summarizes competitors, reviews, and trends you provide.
4. **Operations Assistant:** turns messy processes into SOPs and checklists.
5. **Strategy Sparring Partner:** challenges your plans and asks tough questions.

Step-by-Step: Build Your First Assistant

1. Choose one repetitive job (start with customer replies or content).
2. Write a one-page "Business Brief" (who you are, offers, prices, policies, voice). Use the prompt below.
3. Write the assistant's instructions using the template.
4. Save it as a custom assistant or saved document in your tool.
5. Test it with five realistic requests. Note mistakes.
6. Update instructions to fix the mistakes. Repeat until reliable.

AI Prompt: Create My Business Brief

COPY-AND-PASTE AI PROMPT

Help me create a one-page Business Brief that I can give to any AI assistant. Interview me with questions about: business name, what I sell, prices, who my ideal customer is, their main problems, my brand voice (3-5 adjectives), my policies (booking, refunds, delivery), frequently asked questions, and words or claims to avoid. Then format everything as a clean, scannable brief with headings.

AI Prompt: Assistant Instruction Template

COPY-AND-PASTE AI PROMPT

Write instructions for a custom AI assistant with this structure:

ROLE: You are [ROLE] for [BUSINESS NAME], a [BUSINESS DESCRIPTION].
GOAL: Help me [SPECIFIC JOB].
CONTEXT: Use the attached Business Brief as your source of truth.
TONE: [3-5 ADJECTIVES]. Write at an 8th-grade reading level.
ALWAYS: ask clarifying questions when information is missing; keep responses under [X] words unless asked; offer 2 options when writing copy.
NEVER: invent prices, policies, statistics, testimonials, or guarantees; promise results; share private information.
IF UNSURE: say "I'd need to confirm that" and tell me what to check.
OUTPUT FORMAT: [DESCRIBE]

Improve this draft for clarity and fill in my details:
[MY DETAILS]

EXAMPLE (HYPOTHETICAL): A hypothetical home-cleaning business builds a "Quote Reply Assistant." Its instructions include service prices, service area, what's included in a standard vs. deep clean, and a rule to always ask for the home's size before giving a price range. When a new inquiry arrives, the owner pastes it in and gets a draft reply in seconds, which she reviews and sends.

EXERCISE 3.3: Write your Business Brief and build one assistant. Record its role, rules, and test results on your worksheet.

LESSON 3.4

Writing Powerful Prompts

The Big Idea

A **prompt** is an instruction. Better instructions produce better results. You don't need special tricks; you need the same clarity you'd give a talented human freelancer.

The R-C-T-F-C Framework

Use this five-part structure for any important prompt:

- **R — Role:** Who should the AI act as? ("Act as an experienced copywriter for local service businesses.")
- **C — Context:** Background details. (Business, customer, goal, constraints.)
- **T — Task:** The specific deliverable. ("Write three homepage headlines.")
- **F — Format:** How it should look. (Length, structure, tone, bullet points, table.)
- **C — Checks:** Quality rules. ("Avoid hype. No income claims. Flag assumptions.")

Before and After

Weak prompt: "Write an Instagram caption for my bakery."

Strong prompt:

COPY-AND-PASTE AI PROMPT

```
Act as a social media copywriter for small local food businesses.
Context: I own a small neighborhood bakery known for sourdough and
seasonal fruit pies. My audience is local families and young
professionals who care about fresh, quality ingredients.
Task: Write 3 Instagram captions announcing our new apple-cinnamon
pie, available Friday through Sunday only while supplies last.
Format: 60-100 words each, one emoji max, end with a clear call to
action to pre-order via the link in bio. Offer one playful, one cozy,
and one straightforward version.
Checks: No exaggerated claims like "best in the world." Keep it warm
and genuine.
```

Advanced Prompting Techniques

- **Give examples ("few-shot"):** paste 2–3 examples of writing you like and say "match this style."
- **Step-by-step reasoning:** "Think through this step by step before giving your final recommendation."
- **Constraints:** word counts, reading level, banned words.
- **Personas for feedback:** "Critique this as a skeptical first-time customer."
- **Chaining:** break big tasks into steps: outline → approve → draft section by section → edit.

- **Self-review:** "Review your answer for errors, unsupported claims, and missing steps, then give a corrected version."

AI Prompt: Prompt Improver

COPY-AND-PASTE AI PROMPT

```
I want to get better results from AI. Here's a prompt I wrote:
"[YOUR PROMPT]"
Rewrite it using the Role, Context, Task, Format, and Checks
framework. Then list any missing information you'd need from me to
make it even better, as questions.
```

AI Prompt: Match My Voice

COPY-AND-PASTE AI PROMPT

```
Here are 3 examples of writing that sounds like me:
1. [EXAMPLE]
2. [EXAMPLE]
3. [EXAMPLE]
Describe my writing voice in 5 bullet points (tone, sentence length,
vocabulary, personality, what I avoid). Then use that voice to write:
[NEW TASK].
```

AI Prompt: Critique Before Publishing

COPY-AND-PASTE AI PROMPT

```
Act as a skeptical, detail-oriented editor. Review the text below for:
- Unclear or confusing sentences
- Claims that could be misleading or need evidence
- Grammar and spelling errors
- Missing call to action
- Anything that sounds generic or robotic
List issues first, then provide a revised version.

Text: [PASTE]
```

EXERCISE 3.4: Rewrite three of your own weak prompts using R-C-T-F-C. Record the before/after on your worksheet and note which produced better results.

LESSON 3.5

Automating Repetitive Tasks

The Big Idea

Every business has repetitive tasks: answering the same questions, writing similar emails, formatting documents, copying data between apps. AI helps in two ways: **(1) speeding up the thinking and writing parts** and **(2) connecting with automation tools** (like Zapier, Make, or built-in app automations) that move information between apps automatically.

Step 1: Find Your Repetitive Tasks

For one week, keep a simple "task log." Every time you do something that feels repetitive, write it down along with how long it took. Common candidates:

- Responding to common inquiries
- Writing social media captions
- Creating invoices and sending reminders
- Scheduling appointments
- Summarizing meetings or calls
- Data entry from forms to spreadsheets
- Onboarding new customers

Step 2: Choose the Right Level of Automation

Level	What it is	Example
1. Template	Reusable text you copy and paste	Saved reply for "What are your prices?"
2. AI-assisted	AI drafts, you review	Paste inquiry → AI drafts reply → you send
3. Tool automation	Apps do it automatically on a trigger	New form submission → added to spreadsheet → welcome email sent
4. AI-in-the-loop automation	Automation calls AI as one step	New review → AI drafts response → saved for your approval

Start at Levels 1 and 2. Move to 3 and 4 when a process is stable and you understand it well. Never fully automate anything that could embarrass you or harm a customer without a review step.

Step 3: Write It Down Before You Automate It

You can't automate a process you can't describe. Write a **Standard Operating Procedure (SOP)** first: trigger, steps, tools, and expected output.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical tutoring business spends time every week copying booking-form entries into a spreadsheet and sending confirmation emails. The owner builds a no-code automation: when someone submits the booking form, their details are added to a spreadsheet row and a confirmation email template is sent. She reviews the spreadsheet daily for anything unusual. The task goes from manual copy-and-paste to a quick review.

AI Prompt: Find Automation Opportunities

COPY-AND-PASTE AI PROMPT

```
Here is a log of tasks I did this week, with time spent:
[PASTE TASK LOG]
For each task, recommend an automation level (template, AI-assisted,
tool automation, or AI-in-the-loop) and explain why. Rank the top 5
by time saved vs. effort to set up. For the top 3, outline the steps
to implement, including the type of no-code tool I could use.
Flag any task that should keep a human review step.
```

AI Prompt: Turn a Task Into an SOP

COPY-AND-PASTE AI PROMPT

```
Turn the following description of how I do a task into a clear
Standard Operating Procedure. Include: purpose, trigger (when it
starts), tools needed, numbered steps, quality checks, and what
"done" looks like. Then suggest which steps could be automated.

My description: [DESCRIBE THE TASK IN YOUR OWN WORDS]
```

AI Prompt: Build an Automation Recipe

COPY-AND-PASTE AI PROMPT

I use these tools: [LIST, e.g., Google Forms, Google Sheets, Gmail, Calendly, Stripe]. I want to automate this process: [DESCRIBE].
Write a step-by-step "automation recipe" with:
- Trigger
- Each action in order
- What data passes between steps
- Where a human should review
- How to test it safely before going live

Explain it for a beginner using a no-code automation tool.

EXERCISE 3.5: Keep a task log for 5 days. Pick your top two automation candidates and write an SOP for each.

LESSON 3.6

AI Customer Service

The Big Idea

Fast, friendly, accurate customer service builds trust. AI can help you respond faster and more consistently, but customers must never be misled, and sensitive situations need a human touch.

Where AI Helps in Customer Service

- **Drafting replies** to common questions (you review before sending).
- **FAQ pages** written from real customer questions.
- **Website chat assistants** that answer basic questions from your approved information and hand off to you for anything else.
- **Tone adjustment:** turning a frustrated draft into a calm, professional reply.
- **Summarizing feedback** to find recurring issues.

Customer Service Rules for AI

1. **Use only approved information** (your FAQ, policies, prices). Don't let AI invent answers.
2. **Escalate** refunds, complaints, safety issues, legal questions, and emotional situations to a human.
3. **Be transparent** if customers are chatting with an automated assistant.
4. **Protect privacy.** Don't paste sensitive personal information into tools without understanding their data policies.
5. **Keep it human.** Personalize and sign replies.

The HEARD Method for Difficult Messages

- **Hear:** read fully; understand the actual issue.
- **Empathize:** acknowledge their frustration.
- **Apologize** (where appropriate) for their experience.
- **Resolve:** offer a clear next step within your policy.
- **Diagnose:** later, figure out how to prevent it from recurring.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical online printable shop receives an email: "I paid and never got my download!!" The owner pastes it (without personal details) into her Customer Reply Assistant. The draft acknowledges the frustration, apologizes, re-provides the download instructions, and offers to send the files directly. She checks her order system, confirms the purchase, adds the customer's name, and sends it. Afterward, she updates her checkout confirmation page to make the download link more visible.

AI Prompt: Build My FAQ

COPY-AND-PASTE AI PROMPT

Here are questions customers have asked me (or that I expect):
[LIST QUESTIONS]
Here are my policies and details: [PRICES, HOURS, SERVICE AREA, REFUND POLICY, DELIVERY TIMES]
Write a clear FAQ section with short, friendly answers using ONLY the information I provided. If an answer requires information I haven't given, write "[NEED INFO: ...]" instead of guessing.
Group questions by topic.

AI Prompt: Reply to an Upset Customer

COPY-AND-PASTE AI PROMPT

Help me reply to this customer message using the HEARD method (hear, empathize, apologize, resolve, diagnose). My policy is: [POLICY]. What I can offer: [OPTIONS]. Keep it calm, warm, and under 150 words. Don't admit legal fault or promise anything beyond my policy. Give me two versions.

Customer message (personal details removed): [PASTE]

AI Prompt: Website Chat Assistant Instructions

COPY-AND-PASTE AI PROMPT

Write instructions for a website chat assistant for [BUSINESS].
It should: greet visitors, answer only from the FAQ below, help visitors choose between [OFFERS], collect name and email for a quote request, and hand off to a human for refunds, complaints, and any question it can't answer from the FAQ. It must say it is an automated assistant and must never invent information.
FAQ: [PASTE]

EXERCISE 3.6: Write a 10-question FAQ using real or expected customer questions and create three saved reply templates.

LESSON 3.7

AI Content Generation

The Big Idea

Content (posts, emails, blog articles, videos, product descriptions) attracts and educates customers. AI can help you produce more content, faster, but **quality and authenticity still matter.** Use AI to remove the blank page, not your personality.

The Content Multiplication System

1. **Start with one core idea** (a tip, a customer question, a mistake to avoid).
2. **Create one "pillar" piece** (a blog post, a short video script, or a newsletter).
3. **Repurpose** it into 5–10 smaller pieces: social posts, carousel slides, short video hooks, an email, a Pinterest pin description.
4. **Add your human layer:** personal opinions, real photos, behind-the-scenes, your own examples.

Content Quality Checklist

- Is it accurate? (Verify any facts or numbers.)
- Is it specific to my audience?
- Does it sound like me?
- Does it have a clear point and call to action?
- Would I be proud to put my name on it?
- Does it avoid exaggerated or misleading claims?

AI Prompt: Generate 30 Content Ideas

COPY-AND-PASTE AI PROMPT

```
I run [BUSINESS] for [TARGET CUSTOMER]. Their top problems are:
[PROBLEMS]. Generate 30 content ideas in 5 categories:
1. How-to tips  2. Common mistakes  3. Myths vs. facts
4. Behind the scenes  5. Questions customers ask
For each idea, write a hook (first line) that would make my
audience stop scrolling. No clickbait or false promises.
```

AI Prompt: Repurpose One Piece Into Many

COPY-AND-PASTE AI PROMPT

Here is a piece of content I created: [PASTE BLOG/SCRIPT/NOTES]
Repurpose it into:
- 3 Instagram captions (under 120 words)
- 1 carousel outline (7 slides, headline + 1-2 lines each)
- 3 short-video hooks (under 12 words each) with a 30-second script for one of them
- 1 email newsletter (under 250 words)
- 2 Pinterest pin titles and descriptions
Keep my voice: [VOICE DESCRIPTION].

AI Prompt: Write a Blog Post Outline

COPY-AND-PASTE AI PROMPT

Write a detailed outline for a blog post titled "[TITLE]" for [AUDIENCE]. Include: an introduction hook, 5-7 H2 sections with key points, a practical step-by-step section, an FAQ with 4 questions, and a call to action for [OFFER]. Mark where I should add my own personal example or photo. Suggest a meta description under 155 characters.

EXERCISE 3.7: Pick one core idea and use the repurposing prompt to create at least five pieces of content. Edit each to add your human layer.

LESSON 3.8

AI Market Research

The Big Idea

AI can speed up market research by organizing information, analyzing reviews, generating hypotheses, and helping you plan research. But AI is **not a source of truth** about the market. Feed it real data (reviews, survey answers, competitor pages you've collected) and verify everything it claims.

What AI Can Help You Research

- **Customer language** from reviews, forums, and survey responses (paste them in).
- **Competitor positioning** from pages and offers you collect.
- **Customer personas** based on your interview notes.
- **Survey and interview questions.**
- **Objections** customers may have about your offer.
- **Gaps and opportunities** across competitor offers.

The Research Loop

1. **Collect** real inputs (reviews, interview notes, competitor pages).
2. **Analyze** with AI (summarize themes, compare, find gaps).
3. **Hypothesize** (what might customers want that's missing?).
4. **Test** with real customers (conversations, polls, offers).
5. **Update** your understanding.

AI Prompt: Competitor Comparison

COPY-AND-PASTE AI PROMPT

```
I collected information from 5 competitors' websites (pasted below).
Create a comparison table covering: target customer, main offer,
price (if listed), key promises, guarantees, tone, and what makes
each distinctive. Then identify 3-5 gaps or underserved needs I
could address. Use only the pasted information; write "not listed"
if something isn't shown.

[PASTE COMPETITOR INFO]
```

AI Prompt: Build a Customer Persona From Real Notes

COPY-AND-PASTE AI PROMPT

Based ONLY on these interview notes and quotes, create a customer persona with: situation, goals, frustrations, what they've tried, buying triggers, objections, where they spend time online, and exact phrases they use. Mark anything that is an assumption rather than directly supported by the notes.

Notes: [PASTE]

AI Prompt: Create a Customer Survey

COPY-AND-PASTE AI PROMPT

Write a short customer survey (8-10 questions, under 5 minutes) for [TARGET CUSTOMER] about [TOPIC]. Mix multiple-choice and open-ended questions. Focus on current behavior, frustrations, and what they've spent money on. Avoid leading questions. Include a short intro that explains why I'm asking and how I'll use the answers.

AI Prompt: Objection Finder

COPY-AND-PASTE AI PROMPT

Here is my offer: [DESCRIBE OFFER, PRICE, AUDIENCE].
List the 10 most likely objections a skeptical customer would have (price, trust, timing, need, competition). For each, suggest an honest way to address it on my sales page or in conversation, without pressure tactics or exaggerated claims.

EXERCISE 3.8: Collect information from three competitors and run the comparison prompt. Record three opportunities on your worksheet.

LESSON 3.9

Building Efficient Business Workflows

The Big Idea

A **workflow** is a repeatable sequence of steps that gets a result. Efficient workflows mean less mental energy deciding what to do next and more consistent results. AI fits inside workflows as a helper at specific steps, not as a replacement for the whole thing.

The Weekly AI-Powered Operating Rhythm

Here's a simple weekly rhythm you can adapt:

Day	Focus	Where AI helps
Monday	Plan the week	Turn goals into a prioritized task list
Tuesday	Create content	Draft posts, captions, emails from your idea list
Wednesday	Sales and outreach	Draft personalized outreach and follow-ups
Thursday	Delivery and customer work	Summarize notes, draft deliverables, SOPs
Friday	Admin and review	Categorize expenses, summarize metrics, plan next week

Workflow Design Steps

1. **Name the outcome** ("Publish 3 posts per week").
2. **List every step** from start to finish.
3. **Mark each step:** Human only / AI-assisted / Automated.
4. **Create templates and prompts** for the AI-assisted steps.
5. **Batch similar tasks** (e.g., write all posts in one session).
6. **Review monthly** and remove steps that don't add value.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical freelance social media manager handles four small clients. Her weekly content workflow: Monday, she collects updates from clients via a short form; Tuesday, she uses a saved prompt per client (with each client's brand voice brief) to draft posts; Wednesday, she edits and sends drafts for approval; Thursday, she schedules approved posts. Each step has a checklist. Because the workflow is written down, she could later train a contractor to help with drafting.

AI Prompt: Design My Workflow

COPY-AND-PASTE AI PROMPT

I want to design a repeatable workflow for: [OUTCOME].
Currently I do it like this: [DESCRIBE].
Tools I use: [TOOLS].
Create an improved workflow with numbered steps, labeling each as Human / AI-assisted / Automated. For AI-assisted steps, write the exact prompt I should save. Add a time estimate per step and a weekly schedule for batching.

AI Prompt: Daily Planning Assistant

COPY-AND-PASTE AI PROMPT

Here are my goals for this month: [GOALS]
Here's everything on my to-do list: [PASTE LIST]
I have [X] hours available today.
Prioritize my list using impact vs. effort, choose the 3 most important tasks for today, and put them in a time-blocked schedule with breaks. Move everything else to "later this week" or "delete."

AI Prompt: Weekly Business Review

COPY-AND-PASTE AI PROMPT

Here are my numbers and notes for this week:
- Revenue: [X] - Expenses: [X] - New leads: [X]
- Sales calls/conversations: [X] - Customers won: [X]
- Content published: [X] - Website visitors: [X]
- Notes: [WHAT WENT WELL, WHAT DIDN'T]
Summarize my week, highlight one bottleneck, and suggest 3 focused actions for next week. Ask me one question that would help me think more clearly about my business.

EXERCISE 3.9: Map one important workflow in your business, labeling each step Human, AI-assisted, or Automated, and save the prompts you'll use.

MODULE 3

Module 3 Worksheet

Part A: AI Opportunities and Limits

Five tasks where AI can help me	Three tasks that need careful human review
1.	1.
2.	2.
3.	3.
4.	
5.	

Information I will never paste into AI tools: _____

Part B: My Custom Instructions

What the assistant should know about me and my business:

How the assistant should respond:

Part C: My First AI Business Assistant

Element	My assistant
Name and role	
Goal / job	
Knowledge files attached	

Element	My assistant
ALWAYS rules	
NEVER rules	
Output format	
Test results (5 tests)	
Fixes made	

Part D: Prompt Makeovers (R-C-T-F-C)

Original weak prompt	Improved prompt (summary)	Which result was better?

Part E: Task Log and Automation Plan

Repetitive task	Time per week	Automation level (1–4)	Next step

Part F: Market Research Opportunities

Competitor	Main offer	Price	Gap I noticed

Part G: Workflow Map

Outcome: _____

Step	Human / AI-assisted / Automated	Prompt or tool	Time
1			
2			
3			
4			
5			

MODULE 3

Action Checklist

- [ ] List five tasks where AI can help and three that require careful review
- [ ] Write and save your custom instructions
- [ ] Create a one-page Business Brief
- [ ] Build and test one AI business assistant
- [ ] Rewrite three prompts using R-C-T-F-C
- [ ] Keep a 5-day task log and pick two automation candidates
- [ ] Write SOPs for your top two repetitive tasks
- [ ] Create a 10-question FAQ and three reply templates
- [ ] Generate 30 content ideas and repurpose one into five pieces
- [ ] Run a competitor comparison on three competitors
- [ ] Map one workflow and save its prompts
- [ ] Start a "Prompt Library" document with your best prompts

MODULE 3

Knowledge Check

1. What is an AI "hallucination"?
A) A visual glitch in images
B) Confident but false or invented information
C) A slow response
D) A privacy setting

2. Which is the best use of AI in customer service?
A) Automatically promising refunds
B) Drafting replies from approved policies, with human review for sensitive cases
C) Writing fake reviews
D) Replacing all human contact

3. In the R-C-T-F-C framework, what does the "F" stand for?
A) Facts
B) Feedback
C) Format
D) Focus

4. What should you do before automating a process?
A) Buy the most expensive tool
B) Write it down as an SOP
C) Automate everything at once
D) Remove all review steps

5. Which input makes AI market research most reliable?
A) Asking AI to guess market size
B) Real data you collected, like reviews and interview notes
C) Asking for statistics without sources
D) Using only one-word prompts

6. True or false: It's acceptable to use AI to create customer testimonials if they sound realistic.

7. What is the first step in the Content Multiplication System?
A) Buy ads
B) Start with one core idea
C) Post daily on every platform
D) Hire a team

8. Which task should typically keep a human review step?

A) Sorting files into folders

B) Responding to a complaint about a damaged product

C) Formatting a spreadsheet

D) Generating a list of content ideas

MODULE 3

Answer Key

1. **B.** Hallucinations are invented or incorrect outputs presented confidently. Always verify.
2. **B.** Use approved information and keep a human involved for sensitive situations.
3. **C.** Format: how the output should be structured.
4. **B.** You can't reliably automate a process you haven't documented.
5. **B.** Real data grounds the analysis; AI-generated statistics must be verified.
6. **False.** Fake testimonials are deceptive and can violate FTC rules.
7. **B.** One core idea becomes a pillar piece, then many smaller pieces.
8. **B.** Complaints, refunds, and emotional situations need human judgment.

MODULE

04

BUILD YOUR WEBSITE

4.1 Choosing a Website Platform

4.2 Understanding Domains and Hosting

4.3 Building a Website With AI

4.4 Designing Professional Homepages

4.5 Creating Service Pages

4.6 Creating Product Pages

4.7 Contact Forms

4.8 Lead Generation

4.9 Basic SEO

4.10 Publishing a Website

MODULE 4: BUILD YOUR WEBSITE

MODULE OVERVIEW: Your website is your 24/7 storefront. It's the one online space you control, unlike social media platforms that can change their rules overnight. In this module you'll choose a platform, connect your domain and hosting, use AI to plan and write your site, design a homepage that converts visitors into leads, build service and product pages, add contact forms and lead capture, apply basic SEO, and publish with confidence. Each lesson includes a hands-on build exercise so you finish the module with a live site or a ready-to-publish draft.

In this module:

- Lesson 4.1: Choosing a Website Platform
- Lesson 4.2: Understanding Domains and Hosting
- Lesson 4.3: Building a Website With AI
- Lesson 4.4: Designing Professional Homepages
- Lesson 4.5: Creating Service Pages
- Lesson 4.6: Creating Product Pages
- Lesson 4.7: Contact Forms
- Lesson 4.8: Lead Generation
- Lesson 4.9: Basic SEO
- Lesson 4.10: Publishing a Website

LESSON 4.1

Choosing a Website Platform

The Big Idea

A **website platform** is the software you use to build and manage your site. For beginners, the best platform is the one that lets you publish a professional site quickly, edit it without a developer, and supports what you need to sell. You can always migrate later.

The Main Platform Types

All-in-one website builders (e.g., Squarespace, Wix, Webflow, Hostinger Website Builder, GoDaddy Website Builder). Hosting, templates, security, and editing are bundled. Drag-and-drop editing. Best for: service businesses, portfolios, and simple stores. Trade-off: less flexibility and you're tied to the platform.

WordPress (self-hosted, from WordPress.org). Free open-source software you install on a hosting account. Massive flexibility with themes and plugins. Best for: content-heavy sites, blogs, and those wanting full control. Trade-off: you handle updates, security, backups, and plugin conflicts (or pay someone to).

E-commerce platforms (e.g., Shopify, Squarespace Commerce, WooCommerce on WordPress, BigCommerce). Built around products, inventory, checkout, and shipping. Best for: online stores (Module 7).

Creator/course platforms (e.g., Kajabi, Podia, Teachable, Gumroad, Stan, Payhip). Built for digital products, courses, and memberships, often with simple website pages included.

Link-in-bio and landing page tools (e.g., Carrd, simple landing page builders). Fast, cheap, single-page sites. Great for testing an idea before building a full site.

Decision Guide

If you mainly…	Consider starting with…
Sell services and want bookings/leads	An all-in-one builder
Want to test an idea this week	A single landing page tool
Sell physical products	An e-commerce platform
Sell digital downloads or courses	A creator platform or e-commerce platform with digital delivery
Plan to publish lots of articles and want full control	WordPress

What to Compare

- **Total monthly cost** including add-ons, apps, and transaction fees.
- **Templates** that fit your industry.

- **Ease of editing** on desktop and mobile.
- **Built-in features:** forms, booking, email capture, blog, store, SEO settings.
- **Integrations** with your email marketing, payment, and scheduling tools.
- **Ownership and export:** can you export your content if you leave?
- **Support** quality and documentation.

Most platforms offer free trials. Build a test page on your top two choices before paying.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical mobile car-detailing business needs a homepage, a services page with packages, an online booking calendar, and reviews. The owner trials two all-in-one builders, finds one has a simpler built-in booking tool, and chooses it. She skips WordPress for now because she doesn't want to manage plugins and updates.

AI Prompt: Choose My Platform

COPY-AND-PASTE AI PROMPT

```
Help me choose a website platform. My business: [DESCRIPTION].
I need to: [e.g., take bookings, sell 10 products, collect emails,
publish a blog]. My technical comfort: [LOW/MEDIUM/HIGH].
Monthly budget: [AMOUNT].
Compare 3-4 suitable platform types in a table (features, ease of
use, typical cost structure, limitations). Recommend one for a
beginner and explain how to confirm current pricing on official sites.
```

> **BUILD EXERCISE 4.1:** Start free trials on your top two platforms. Build the same simple test page (headline, paragraph, button) on each. Record which felt easier on your worksheet, then commit to one.

LESSON 4.2

Understanding Domains and Hosting

The Big Idea

Think of your website as a house. The **domain** is the street address (yourbusiness.com). **Hosting** is the land the house sits on: the server space that stores your site's files and delivers them to visitors. **DNS** (Domain Name System) is the map that tells browsers which server your domain points to.

How the Pieces Connect

1. You register a domain at a **registrar** (Module 2, Lesson 2.6).
2. You host your site on a **platform or hosting provider.**
3. You **connect** them by updating DNS records at your registrar (often an A record and/or CNAME record), or by changing your domain's nameservers to your host. Your platform will give exact instructions.
4. Your **email** may also use DNS records (MX records). Be careful not to delete email records when connecting your website.

Hosting Options

- **Included hosting:** All-in-one builders and e-commerce platforms include hosting. Simplest option.
- **Shared hosting:** Your site shares a server with others. Common for WordPress beginners. Low cost.
- **Managed WordPress hosting:** Host handles updates, backups, and speed for WordPress sites. Moderate cost.
- **VPS/cloud hosting:** More control and power, more technical. Usually unnecessary for beginners.

SSL Certificates (HTTPS)

An SSL/TLS certificate encrypts data between visitors and your site and shows "https://" and a padlock in browsers. Most modern platforms and hosts provide it free. **Make sure it's active** before launching; browsers may warn visitors about sites without it, especially those with forms.

Common DNS Records (Plain-English Glossary)

Record	What it does
A record	Points your domain to a server's IP address
CNAME	Points one name (like www) to another name
MX	Routes your email to your email provider
TXT	Verifies ownership and holds email security settings (SPF, DMARC)

Record	What it does
Nameservers	Decide which company manages all your DNS records

DNS changes can take anywhere from a few minutes to around 48 hours to fully update across the internet ("propagation").

Step-by-Step: Connect Your Domain

1. In your website platform, find "Domains" or "Connect a domain."
2. Choose "connect a domain I already own."
3. Follow the instructions to add the listed DNS records at your registrar (or change nameservers).
4. Take a screenshot of your existing DNS records before changing anything, especially email records.
5. Wait for verification; most platforms show a status indicator.
6. Confirm both yourbusiness.com and www.yourbusiness.com load your site with HTTPS.

AI Prompt: Help Me Connect My Domain

COPY-AND-PASTE AI PROMPT

```
I registered my domain at [REGISTRAR] and built my site on
[PLATFORM]. My email is hosted with [EMAIL PROVIDER]. The platform
asks me to add these records: [PASTE INSTRUCTIONS].
My current DNS records are: [PASTE OR DESCRIBE].
Explain step by step what I need to add or change, which existing
records I must NOT delete (to keep email working), and how to check
that it worked. Suggest I confirm with each provider's help docs.
```

BUILD EXERCISE 4.2: Screenshot your current DNS settings and save them. Connect your domain to your platform (or write the exact steps you'll follow if you're not ready to connect yet).

LESSON 4.3

Building a Website With AI

The Big Idea

AI can help you plan your site structure, write your copy, suggest layouts, generate placeholder images, and even produce code. Many website builders now include built-in AI site generators. The fastest path for most beginners: **use AI to plan and write; use your platform's templates to design; use your own judgment to edit.**

The AI Website Build Process

1. **Brief:** Give AI your Business Brief (from Module 3) and your goals.
2. **Sitemap:** Ask AI to propose your pages and navigation.
3. **Page outlines:** For each page, generate a section-by-section outline.
4. **Copy:** Generate drafts for each section, then edit for accuracy and voice.
5. **Design:** Choose a template, apply your brand colors and fonts, and replace placeholder text.
6. **Images:** Use your own photos where possible (they build trust). Use stock photos or AI-generated images thoughtfully for backgrounds or concepts. Don't use AI images that could mislead (e.g., fake "team photos" or fake "customer" photos).
7. **Review:** Check every claim, price, and link.

The Starter Sitemap for Most Small Businesses

- **Home:** who you help, how, and what to do next.
- **Services or Shop:** what you offer.
- **About:** who you are and why you do this.
- **Contact:** how to reach you or book.
- **Legal pages:** Privacy Policy, Terms, and (for stores) Refund/Shipping Policy.
- **Optional:** FAQ, Blog/Resources, Portfolio/Work.

> **NOTE:** If you collect personal information (even just emails), you generally need a privacy policy, and some states have specific privacy laws. Many platforms offer templates; consider having an attorney review your policies, especially if you collect sensitive data.

AI Prompt: Plan My Website

COPY-AND-PASTE AI PROMPT

Using the Business Brief below, plan a website for my business.
Provide:
1. A sitemap (pages and navigation menu)
2. The main goal of each page
3. A section-by-section outline for the homepage and services page
4. The primary call to action across the site
5. Which pages need trust elements (photos, credentials, policies)
Keep it simple enough for a beginner to build in a weekend.

Business Brief: [PASTE]

AI Prompt: Write a Full Page Draft

COPY-AND-PASTE AI PROMPT

Write website copy for my [PAGE NAME] page following this outline:
[PASTE OUTLINE]
Audience: [TARGET CUSTOMER]. Voice: [VOICE].
Rules: clear over clever, short paragraphs, specific benefits,
no exaggerated claims, no invented testimonials or statistics.
Mark places where I should add a real photo, real credential, or
real review with [ADD: ...]. Provide 3 headline options.

AI Prompt: Generate a Simple Landing Page (Code)

COPY-AND-PASTE AI PROMPT

Write a single-file HTML page with embedded CSS (no frameworks)
for a landing page for [BUSINESS]. Sections: hero with headline,
subheadline and button; 3 benefits; how it works (3 steps); FAQ
(4 questions); final call to action; footer with business name and
links to Privacy Policy. Colors: [COLORS]. Font: a system font stack.
Make it mobile-responsive and accessible (alt text placeholders,
good contrast, semantic headings). Use placeholder text I can edit.

BUILD EXERCISE 4.3: Run the "Plan My Website" prompt. Write your final sitemap on your worksheet and pick a template on your chosen platform that fits it.

LESSON 4.4

Designing Professional Homepages

The Big Idea

Many visitors decide within seconds whether to stay on a page. Your homepage must quickly answer three questions: **What is this? Is it for me? What do I do next?**

The High-Clarity Homepage Structure

1. **Hero section (top of page):** clear headline (what you do and for whom), short subheadline (the main benefit), primary button ("Book a Free Call," "Get a Quote," "Shop Now"), and a relevant image.
2. **Problem section:** show you understand the customer's situation in their words.
3. **Solution / services overview:** your 2–4 main offers with short descriptions and links.
4. **How it works:** 3 simple steps to get started.
5. **Trust builders:** real reviews (only genuine ones), credentials, photos of you or your work, guarantees you actually honor, "as seen in" only if true.
6. **About preview:** a short personal intro with a photo.
7. **FAQ:** answer the top objections.
8. **Final call to action:** repeat your main button.
9. **Footer:** contact info, service area, links to policies, social links.

Headline Formulas

- **[Result] for [Audience]** — "Spotless Homes for Busy Families in Columbus"
- **[Service] Without [Pain]** — "Bookkeeping Without the Monthly Panic"
- **We Help [Audience] [Achieve Result]** — "We Help Local Restaurants Fill More Tables Online"

Design Principles for a Premium Look

- **Whitespace:** give elements room to breathe.
- **Hierarchy:** one clear headline, smaller subheadline, obvious button.
- **Limited palette:** 1–2 brand colors plus neutrals; use the accent color for buttons.
- **Two fonts max:** one for headings, one for body text.
- **Consistent buttons:** same style and color everywhere.
- **Real photos** beat generic stock whenever possible.
- **Mobile first:** many visitors will see your site on a phone. Check every section on mobile.
- **Accessibility:** sufficient color contrast, descriptive link text, alt text on images, readable font sizes.

EXAMPLE (HYPOTHETICAL): A hypothetical dog-walking business homepage: Headline "Happy, Tired Dogs While You're at Work." Subheadline "Reliable midday walks for dogs in [Neighborhood], with photo updates after every walk." Button "Book a Meet-and-Greet." Below: three steps (book a free meet-and-greet, choose your schedule, get photo updates), pricing overview, a real photo of the owner with her own dog, a FAQ about keys and safety, and a final button.

AI Prompt: Write My Homepage

COPY-AND-PASTE AI PROMPT

Write homepage copy for [BUSINESS], serving [AUDIENCE] in [LOCATION/ online]. Main offer: [OFFER]. Primary call to action: [CTA]. Follow this structure: hero (5 headline options + subheadline + button text), problem section, services overview, how it works (3 steps), trust section placeholders, short about preview, FAQ (5 questions), final CTA. Use the customer's language: [PASTE QUOTES FROM YOUR RESEARCH]. No hype, no invented proof.

AI Prompt: Five-Second Test Review

COPY-AND-PASTE AI PROMPT

Here is my homepage text from top to bottom: [PASTE]
Pretend you're a first-time visitor who is [TARGET CUSTOMER] and only reads the top section for five seconds. Answer: What does this business do? Is it for me? What should I do next? Then list the top 5 changes that would make the page clearer.

BUILD EXERCISE 4.4: Build your homepage using the nine-section structure. Then ask two people (ideally in your target audience) to look at it for five seconds and tell you what you do. Record their answers on your worksheet.

LESSON 4.5

Creating Service Pages

The Big Idea

A service page helps a potential customer understand exactly what they get, decide if it's right for them, and take the next step. Vague service pages create endless back-and-forth emails. Clear ones pre-qualify leads.

One Page or Many?

- **One services page** works when you offer 2–4 related services.
- **Separate pages per service** are better when services are distinct, when you want each to rank in search for different keywords, or when each needs detailed explanation.

The Service Page Structure

1. **Headline:** the service and the outcome.
2. **Who it's for (and who it's not for).**
3. **The problem it solves.**
4. **What's included:** specific deliverables, timeline, and process.
5. **Packages or pricing:** exact prices, starting prices, or "request a quote" (Module 6 covers pricing strategy).
6. **Process:** step-by-step what happens after they reach out.
7. **Proof:** real examples of your work, genuine reviews, credentials.
8. **FAQ:** turnaround time, revisions, payment, cancellations.
9. **Call to action.**

Package Presentation Example

Package (hypothetical)	Best for	Includes
Starter	New businesses	One-page website, 2 revisions, mobile setup
Standard	Growing businesses	Up to 5 pages, contact form, basic SEO setup
Premium	Established businesses	Up to 10 pages, booking integration, 30 days of edits

Packages make choosing easier and let customers self-select.

AI Prompt: Write a Service Page

COPY-AND-PASTE AI PROMPT

Write a service page for [SERVICE] offered by [BUSINESS] to [AUDIENCE]. Include: headline + subheadline, who it's for / not for, the problem, what's included (bullets), [3] packages with names and inclusions (I'll add prices: [PRICES or "use placeholders"]), a 4-step process, a 6-question FAQ, and a call to action to [CTA]. Mark [ADD PROOF] where I should insert real examples or reviews.

AI Prompt: Clarify My Deliverables

COPY-AND-PASTE AI PROMPT

I offer [SERVICE]. Here's how I'd describe what clients get: [DESCRIBE]. Turn this into a clear, specific list of deliverables, timelines, and limits (e.g., number of revisions, response times) so customers know exactly what to expect. Then list questions I should answer to avoid scope creep.

BUILD EXERCISE 4.5: Write and publish (or draft) your service page with at least one package, a process section, and an FAQ.

LESSON 4.6

Creating Product Pages

The Big Idea

A product page must do the job of a salesperson in a store: show the product clearly, answer questions, address doubts, and make buying easy. (Module 7 goes deeper into online stores.)

Essential Elements of a Product Page

1. **Product name** that's clear and searchable.
2. **High-quality images:** multiple angles, scale, in use. For digital products, show previews/mockups that accurately represent what's included.
3. **Price** and any options (size, color, format).
4. **Benefit-focused description:** what it does for the buyer.
5. **Specifications:** dimensions, materials, file formats, compatibility.
6. **What's included.**
7. **Shipping and delivery information** (or instant download details).
8. **Return/refund policy** link.
9. **Genuine reviews** (only real ones).
10. **Clear "Add to Cart" / "Buy Now" button.**

Description Formula: Hook, Benefits, Details, Reassurance

- **Hook:** one sentence about the outcome or feeling.
- **Benefits:** 3–5 bullets about how it helps.
- **Details:** specs and what's included.
- **Reassurance:** delivery, policy, support.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical digital wedding-planner template. Hook: "Plan your wedding in one organized place, without juggling ten different apps." Benefits: budget tracker, guest list with RSVP status, vendor contacts, timeline. Details: Google Sheets file, 8 tabs, instant access after purchase. Reassurance: setup video included; contact support for help accessing your file.

AI Prompt: Write a Product Page

COPY-AND-PASTE AI PROMPT

Write a product page for: [PRODUCT NAME AND DESCRIPTION]. Audience: [WHO]. Price: [PRICE]. Format/specs: [DETAILS]. Use: a hook sentence, 5 benefit bullets, a "What's included" list, a specs list, delivery/shipping info: [INFO], and a short reassurance paragraph referencing my policy: [POLICY]. Also write an SEO title (under 60 characters) and meta description (under 155 characters). Do not exaggerate or claim results I can't prove.

BUILD EXERCISE 4.6: If you sell products, create one complete product page. If you sell services, create a "productized" service page for one fixed-scope, fixed-price offer.

LESSON 4.7

Contact Forms

The Big Idea

Contact forms turn interested visitors into conversations. A good form is short, clear, and sets expectations about what happens next.

Contact Form Best Practices

- **Ask only what you need.** Name, email, and message may be enough. Each extra field can reduce submissions.
- **Use qualifying questions sparingly.** For services, one or two helpful questions (budget range, timeline, service needed) can save time.
- **Set expectations:** "We reply within one business day."
- **Confirmation message:** show a thank-you message or page and send an automatic confirmation email.
- **Spam protection:** enable your platform's spam filter or CAPTCHA.
- **Privacy:** link to your privacy policy near the form. Add a consent checkbox if you'll add them to marketing emails.
- **Test it:** submit the form yourself and confirm you receive the notification.

Alternatives and Additions

- **Booking calendars** (e.g., Calendly, Acuity, or built-in tools) let people schedule directly.
- **Click-to-call and click-to-text** buttons for local businesses.
- **Quote request forms** with service-specific questions.

AI Prompt: Design My Contact Form

COPY-AND-PASTE AI PROMPT

```
Design a contact/quote form for [BUSINESS] that offers [SERVICES].
Suggest the minimum fields needed, 1-2 optional qualifying questions,
the helper text under each field, the button text, the on-screen
thank-you message, and an automatic confirmation email (under 100
words) that sets expectations for when I'll reply.
```

BUILD EXERCISE 4.7: Add a contact form to your site, write your thank-you message and confirmation email, and test it from your phone and computer.

LESSON 4.8

Lead Generation

The Big Idea

Most visitors aren't ready to buy on their first visit. **Lead generation** means capturing contact information (usually email) from interested visitors so you can follow up with helpful information and offers over time, with their permission.

The Lead Magnet

A **lead magnet** is a free, useful resource offered in exchange for an email address. Good lead magnets are:

- **Specific:** solves one small problem quickly.
- **Relevant:** connected to what you sell.
- **Quick to consume:** a checklist, template, short guide, quiz, or mini video.
- **Valuable:** genuinely helpful on its own.

Examples (hypothetical): a "Move-Out Cleaning Checklist" for a cleaning business; a "5-Day Meal Prep Template" for a nutrition coach; a "Website Launch Checklist" for a web designer.

Where to Place Lead Capture

- Homepage section below the hero or near the bottom.
- End of blog posts.
- A dedicated landing page (for social media links).
- A gentle pop-up or slide-in (use sparingly; make it easy to close).

Connecting to Email Marketing

Connect your form to an email marketing tool (many have free starter plans) so subscribers automatically receive the lead magnet and a short welcome sequence (Module 8). Follow CAN-SPAM rules for marketing emails and only add people who opted in.

AI Prompt: Brainstorm Lead Magnets

COPY-AND-PASTE AI PROMPT

```
I sell [OFFER] to [AUDIENCE]. Their biggest early-stage problems are:
[PROBLEMS]. Suggest 10 lead magnet ideas (checklists, templates,
quizzes, mini-guides). For each: title, format, what's inside, and
how it naturally leads to my paid offer. Rank the top 3 by
ease of creation and relevance.
```

AI Prompt: Write My Opt-In Section

COPY-AND-PASTE AI PROMPT

Write an email opt-in section for my lead magnet "[TITLE]" for [AUDIENCE]. Include: a headline, 3 bullet points about what's inside, the button text, a privacy reassurance line, and the thank-you page message. Then write the delivery email that sends the download link. Keep it honest and concise.

BUILD EXERCISE 4.8: Create one simple lead magnet (a one- or two-page checklist is fine), add an opt-in form to your homepage, and test that the delivery email arrives.

LESSON 4.9

Basic SEO

The Big Idea

Search Engine Optimization (SEO) helps your pages show up when people search on Google and other search engines. SEO results usually build over months, not days, and no one can guarantee rankings. But basic on-page SEO is simple and worth doing from the start. (Module 5 covers SEO strategy more deeply.)

The On-Page SEO Basics

1. **Keyword focus:** choose one main search phrase per page (e.g., "dog walker in Plano TX").
2. **Title tag:** include the keyword, under about 60 characters. This is the clickable headline in search results.
3. **Meta description:** a compelling summary under about 155 characters. It may influence clicks, though search engines sometimes rewrite it.
4. **H1 heading:** one clear main heading per page, ideally including the keyword naturally.
5. **URL slug:** short and descriptive (/dog-walking-plano).
6. **Content:** genuinely answer what the searcher wants. Write for people first.
7. **Images:** descriptive file names and alt text; compress images for speed.
8. **Internal links:** link related pages together.
9. **Mobile-friendly and fast:** check with Google's PageSpeed Insights.
10. **Local signals (local businesses):** name, address/service area, and phone consistent across your site and listings; a Google Business Profile (Module 5).

Technical Basics Checklist

- HTTPS active.
- XML sitemap (most platforms generate one automatically).
- Submit your site to **Google Search Console** (free) to monitor indexing and search performance.
- Set your site to be visible to search engines (some platforms hide sites during trials or "coming soon" mode).

AI Prompt: SEO for One Page

COPY-AND-PASTE AI PROMPT

My page is about [TOPIC/SERVICE] for [AUDIENCE] in [LOCATION/online].
Suggest:
- 1 primary keyword and 5 related phrases a real customer might search
- An SEO title (under 60 characters)
- A meta description (under 155 characters)
- An H1 heading
- A URL slug
- 5 questions the page should answer to be genuinely helpful
Note that I should check real search data in Google Search Console or keyword tools rather than relying on your guesses.

AI Prompt: Write Alt Text

COPY-AND-PASTE AI PROMPT

Write concise, descriptive alt text (under 125 characters) for each of these images on my [BUSINESS] website. Describe what's actually in the image for someone using a screen reader; include a keyword only if it fits naturally.
Images: [DESCRIBE EACH IMAGE]

BUILD EXERCISE 4.9: Complete the SEO table on your worksheet for your homepage and main service/product page, then enter the titles, descriptions, and alt text in your platform's SEO settings.

LESSON 4.10

Publishing a Website

The Big Idea

Publishing isn't the finish line; it's the starting line. A simple, accurate, working site that's live this week is more valuable than a perfect site that's still in draft next month. Use a checklist so you don't launch with broken links or missing information.

The Pre-Launch Checklist

Content

- [ ] Every page proofread (use AI to spot errors, then read aloud yourself)
- [ ] Prices, policies, contact information, and service area are correct
- [ ] No placeholder text ("Lorem ipsum," "[ADD PROOF]") remains
- [ ] No unverified claims, fake reviews, or invented statistics

Function

- [ ] All buttons and links work
- [ ] Contact form and email opt-in tested; notifications received
- [ ] Checkout tested (if selling), including a test or low-cost real purchase and refund
- [ ] Booking calendar tested (if used)

Design and accessibility

- [ ] Checked on mobile, tablet, and desktop
- [ ] Images load quickly and have alt text
- [ ] Text is readable with good contrast

Technical

- [ ] Domain connected; HTTPS active on both www and non-www
- [ ] Favicon added
- [ ] Site visible to search engines
- [ ] Google Search Console set up and sitemap submitted
- [ ] Analytics installed (e.g., the platform's built-in analytics or Google Analytics)

Legal and trust

- [ ] Privacy policy published and linked in the footer
- [ ] Terms, refund, and shipping policies (as applicable)
- [ ] Cookie consent banner if your tools and audience require it

- [ ] Business contact information visible

After Launch

1. Announce your site to your network and on social media.
2. Add the URL to your email signature, social profiles, and Google Business Profile.
3. Watch analytics weekly: which pages get visits, where people leave.
4. Collect feedback from early visitors and customers.
5. Schedule a monthly website improvement session.

AI Prompt: Pre-Launch Proofread

COPY-AND-PASTE AI PROMPT

```
Proofread this website page copy. List any spelling, grammar,
clarity, or consistency issues; any claims that sound exaggerated or
need proof; any missing information a customer would expect (price,
next steps, contact info); and any placeholder text left behind.
Then give the corrected copy.

Page: [PASTE]
```

AI Prompt: Write My Launch Announcement

COPY-AND-PASTE AI PROMPT

```
Write a short, genuine announcement that my website for [BUSINESS]
is live. Versions: a personal text/message to friends and family,
a LinkedIn post, an Instagram caption, and a Facebook post. Explain
who I help and invite people to visit [URL] or share it with
someone who might need it. No hype; sound like a real person.
```

BUILD EXERCISE 4.10: Complete the full pre-launch checklist, publish your site, and send your launch announcement to at least 10 people.

MODULE 4

Module 4 Worksheet

Part A: Platform Decision

Platform tested	Ease (1–5)	Features I need?	Monthly cost (verified)	Notes

Platform chosen: _____

Part B: Domain and Hosting

Item	Details
Domain	
Registrar	
DNS screenshot saved?	
Records added	
HTTPS working on www and non-www?	

Part C: My Sitemap

Page	Main goal	Primary call to action	Status
Home			
Services / Shop			

Page	Main goal	Primary call to action	Status
About			
Contact			
Privacy Policy			

Part D: Homepage Plan

Headline: _____

Subheadline: _____

Primary button text: _____

Five-second test results:

Tester	What they think I do	Was it correct?

Part E: Lead Magnet

Title: _____ Format: _____

Opt-in placed on: _____ Delivery email tested? Yes / No

Part F: SEO Settings

Page	Primary keyword	Title tag	Meta description	URL slug
Home				

Page	Primary keyword	Title tag	Meta description	URL slug

Part G: Launch

Launch date: _____ Pre-launch checklist complete? Yes / No

People I'll announce to (at least 10): _____

MODULE 4

Action Checklist

- [ ] Test two platforms and choose one
- [ ] Connect your domain without breaking email; confirm HTTPS
- [ ] Generate your sitemap and page outlines with AI
- [ ] Build your homepage with the nine-section structure
- [ ] Run a five-second test with two people
- [ ] Build your service page and/or product page
- [ ] Add and test a contact form with a confirmation email
- [ ] Create a lead magnet and connect an opt-in form
- [ ] Complete on-page SEO for key pages; set up Google Search Console
- [ ] Publish a privacy policy and other needed policies
- [ ] Complete the pre-launch checklist and publish
- [ ] Announce your site to at least 10 people

MODULE 4

Knowledge Check

1. In the house analogy, what is hosting?
A) The street address
B) The land/space where the site's files live
C) The front door
D) The mailbox

2. What three questions must a homepage answer quickly?
A) Who founded it, when, and why
B) What is this, is it for me, what do I do next
C) Price, location, hours
D) Colors, fonts, images

3. Which DNS record type routes email?
A) A record
B) CNAME
C) MX
D) Favicon

4. What is a lead magnet?
A) A paid ad
B) A free, useful resource offered in exchange for an email address
C) A pop-up that can't be closed
D) A type of hosting

5. What's the recommended length for a title tag?
A) Under about 60 characters
B) Exactly 300 characters
C) At least 150 words
D) Length doesn't matter

6. True or false: Good SEO can guarantee a first-page ranking within one week.

7. Which is a contact form best practice?
A) Ask 20 questions to qualify leads
B) Ask only what you need and set response-time expectations
C) Never send a confirmation
D) Hide the privacy policy

8. Which image use is NOT appropriate?

A) Your own photos of your work

B) Licensed stock photos for backgrounds

C) AI-generated "customer" photos presented as real customers

D) Product mockups that accurately show what's included

MODULE 4

Answer Key

1. **B.** Hosting stores and serves your website's files.
2. **B.** What is this, is it for me, and what do I do next.
3. **C.** MX records route email to your email provider.
4. **B.** A lead magnet is a free, useful resource in exchange for contact information.
5. **A.** Keep title tags under about 60 characters so they display well.
6. **False.** No one can guarantee rankings; SEO usually takes months.
7. **B.** Keep forms short and set clear expectations.
8. **C.** Presenting AI-generated people as real customers is misleading.

MODULE

05

MARKETING YOUR BUSINESS

5.1 Understanding Your Target Customer

5.2 Building a Brand

5.3 Social Media Marketing

5.4 Facebook Marketing

5.5 Instagram Marketing

5.6 TikTok Marketing

5.7 Pinterest Marketing

5.8 Google Business Profile

5.9 SEO Fundamentals

5.10 Organic Lead Generation

5.11 Creating Promotional Content With AI

MODULE 5: MARKETING YOUR BUSINESS

MODULE OVERVIEW: A great offer that nobody hears about won't make sales. Marketing is how the right people discover you, trust you, and decide to take the next step. In this module you'll define your target customer precisely, build a consistent brand, learn how each major platform works (Facebook, Instagram, TikTok, Pinterest), set up your Google Business Profile, understand SEO fundamentals, generate leads without paid ads, and use AI to create promotional content efficiently and honestly.

In this module:

- Lesson 5.1: Understanding Your Target Customer
- Lesson 5.2: Building a Brand
- Lesson 5.3: Social Media Marketing
- Lesson 5.4: Facebook Marketing
- Lesson 5.5: Instagram Marketing
- Lesson 5.6: TikTok Marketing
- Lesson 5.7: Pinterest Marketing
- Lesson 5.8: Google Business Profile
- Lesson 5.9: SEO Fundamentals
- Lesson 5.10: Organic Lead Generation
- Lesson 5.11: Creating Promotional Content With AI

> **NOTE:** Social platforms change features, algorithms, and policies frequently. Use this module's principles as your foundation and check each platform's official help center for current details. Results from marketing vary widely and are never guaranteed.

LESSON 5.1

Understanding Your Target Customer

The Big Idea

Your **target customer** (also called an ideal customer or customer avatar) is the specific person most likely to need, value, and buy what you sell. When you know them well, you know what to say, where to say it, and how to say it.

The Target Customer Profile

Go beyond demographics. Capture:

- **Situation:** what's going on in their life or business right now?
- **Demographics (as relevant):** age range, location, job, household.
- **Problems and frustrations:** in their own words (use your Module 1 research).
- **Goals and desires:** what does success look like for them?
- **Objections and fears:** why might they hesitate to buy?
- **Buying triggers:** what event makes them start looking for a solution?
- **Where they spend time:** platforms, groups, publications, local places.
- **Who influences them:** people and sources they trust.

Jobs to Be Done

Ask: *What "job" is the customer hiring my product to do?* A busy parent hiring a meal-prep service isn't buying food; they're buying back evenings and reducing stress. When your marketing speaks to the job, it resonates more than features alone.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical dog-walking business defines its target customer: dual-income professionals in a specific neighborhood, working 9-to-5 jobs away from home, with young or high-energy dogs. Their frustration: guilt and worry about the dog being alone all day. Buying trigger: returning to the office after working from home, or getting a new puppy. Where they spend time: neighborhood Facebook groups, Nextdoor, local Instagram accounts, the vet's office bulletin board.

Step-by-Step: Build Your Profile

1. Review your Module 1 customer quotes and interview notes.
2. Fill out the Target Customer Profile on your worksheet.
3. Write a one-paragraph "day in the life" of your customer.
4. List the top three buying triggers.
5. Validate with two real people in your audience: "Does this sound like you?"

AI Prompt: Build My Target Customer Profile

COPY-AND-PASTE AI PROMPT

Using my research notes below, build a target customer profile with: situation, relevant demographics, top 5 frustrations (in their words), goals, objections, buying triggers, where they spend time online and offline, and the "job" they hire my product to do. Mark anything that's an assumption vs. supported by my notes.

Business: [DESCRIPTION]
Research notes: [PASTE QUOTES AND INTERVIEW NOTES]

EXERCISE 5.1: Complete your Target Customer Profile and "day in the life" paragraph on your worksheet.

LESSON 5.2

Building a Brand

The Big Idea

Your **brand** isn't just a logo. It's what people think and feel about your business, shaped by every interaction: your visuals, words, service, and reputation. As a small business, you can build a strong brand through **clarity and consistency.**

The Brand Foundation

1. **Mission:** why your business exists ("We help busy families eat well without the stress").
2. **Positioning statement:** *For [target customer] who [need], [business] is the [category] that [key benefit], unlike [alternatives] because [reason to believe].*
3. **Brand personality:** 3–5 adjectives (e.g., warm, reliable, straightforward).
4. **Voice guidelines:** how you write (short sentences? humor? formal or casual?), words you use, words you avoid.
5. **Visual identity:** logo, colors, fonts, photo style.
6. **Brand promise:** what customers can always count on (only promise what you consistently deliver).

Simple Visual Identity for Beginners

- **Logo:** a clean wordmark (your name in a good font) is perfectly professional to start. Free design tools or a freelance designer can help.
- **Colors:** 1 primary color, 1 accent color, and neutrals (black, white, gray).
- **Fonts:** one heading font and one body font.
- **Photo style:** consistent lighting and mood.
- **Templates:** create social media templates so everything looks consistent.

Write all of this in a one-page **brand style guide.**

> **EXAMPLE (HYPOTHETICAL):** A hypothetical bookkeeping business chooses: personality "calm, precise, friendly"; colors navy and soft green with white; a clean sans-serif font; a voice that avoids jargon and never uses fear-based messaging about the IRS. Every post, email, and invoice follows the same style, so the business feels established even though it's brand new.

AI Prompt: Create My Brand Foundation

COPY-AND-PASTE AI PROMPT

Help me create a brand foundation for [BUSINESS] serving [AUDIENCE]. Ask me 8 questions first about my values, customers, competitors, and what I want people to feel. Then write: a mission statement, a positioning statement (using the "For [customer] who [need]..." format), 5 personality adjectives with explanations, voice guidelines (do's and don'ts with examples), and 3 tagline options.

AI Prompt: Suggest a Visual Direction

COPY-AND-PASTE AI PROMPT

My brand personality is [ADJECTIVES] and my audience is [AUDIENCE]. Suggest 3 visual directions, each with: a primary and accent color (with hex codes), a heading and body font pairing (free fonts like Google Fonts), a photo style description, and the overall feeling. Explain which direction best fits my audience and why.

EXERCISE 5.2: Write your one-page brand style guide on the worksheet: mission, positioning, personality, voice, colors, fonts.

LESSON 5.3

Social Media Marketing

The Big Idea

Social media lets you reach people where they already spend time. But trying to be everywhere at once usually leads to burnout. **Choose one or two platforms** where your target customer actually spends time, show up consistently, and expand later.

Choosing Your Platforms

Platform	Often well suited for	Content style
Facebook	Local businesses, community groups, many adult audiences	Posts, groups, events, video
Instagram	Visual businesses, lifestyle, local, creators	Photos, Reels, carousels, Stories
TikTok	Reaching new audiences with short video, younger audiences and beyond	Short entertaining/educational video
Pinterest	Planning, DIY, home, food, weddings, fashion, digital products	Vertical pins linking to websites
LinkedIn	B2B services, professional audiences	Professional insights, articles
YouTube	Tutorials, longer education, searchable video	Long-form and Shorts

These are general tendencies. Audiences on every platform are broad; check where *your* customers actually are.

The Content Pillar System

Choose **3–5 content pillars** (recurring themes) aligned with your customer's interests:

1. **Educate:** tips, how-tos, mistakes to avoid.
2. **Show:** behind-the-scenes, process, your work.
3. **Connect:** your story, values, personal perspective.
4. **Prove:** genuine reviews, before/afters (with permission), results you can document.
5. **Offer:** your services/products and calls to action.

A common guideline: most content should educate, entertain, or connect; a smaller portion should directly sell.

Consistency Over Volume

A sustainable schedule (for example, 3 posts per week) you keep for months beats 3 posts per day for one week. Batch-create content in one session per week and schedule it with the platform's built-in tools or a scheduler.

Engagement Is Marketing Too

- Reply to comments and messages promptly.
- Comment thoughtfully on posts in your niche (not spam).
- Participate in relevant groups and communities, following their rules.

Honesty Rules for Social Media

- Disclose paid partnerships and affiliate links clearly (FTC Endorsement Guides).
- Don't buy followers, likes, or reviews.
- Don't post fake testimonials or misleading before/after images.
- Only share customer content with permission.

AI Prompt: Choose Platforms and Pillars

COPY-AND-PASTE AI PROMPT

```
My business: [DESCRIPTION]. Target customer: [PROFILE SUMMARY].
I can spend [X] hours per week on social media.
Recommend the 1-2 best platforms for me and explain why. Then
suggest 4 content pillars with 5 post ideas each, and a realistic
weekly posting schedule I can sustain.
```

EXERCISE 5.3: Choose your primary platform (and optional secondary), define four content pillars, and set a weekly posting schedule.

LESSON 5.4

Facebook Marketing

The Big Idea

Facebook remains useful for many small businesses, especially local and community-focused ones, through **Business Pages, Groups, Events, Marketplace (for certain items), and Messenger.**

Setting Up a Facebook Page

1. Create a Page from your personal account (the Page is separate from your personal profile).
2. Add a profile image (logo or your photo) and a cover image.
3. Complete the About section: description, category, contact info, website, hours, service area.
4. Add a call-to-action button (Book Now, Send Message, etc.).
5. Invite friends who might genuinely be interested (not everyone).

What Works on Facebook

- **Community groups:** Participate genuinely in local or niche groups. Many prohibit promotion except on specific days; follow the rules. Be helpful first.
- **Your own group:** Some businesses create a free group around a topic (e.g., "Beginner Container Gardening in [City]") to build a community.
- **Events:** For workshops, open houses, pop-ups.
- **Video and Reels:** Short video often gets more reach than text-only posts.
- **Messenger:** Respond quickly; set up saved replies.

Facebook Post Ideas

- A quick tip with a photo.
- "Ask me anything about [topic]" thread.
- A behind-the-scenes look at a job (with client permission).
- Announcing availability or a seasonal offer.
- Sharing a genuine review (with permission).

> **EXAMPLE (HYPOTHETICAL):** A hypothetical handyman business joins three neighborhood groups. Instead of posting ads, he answers DIY questions helpfully when he knows the answer. On designated promotion days, he posts a simple introduction with photos of his work. People who've seen his helpful answers recognize his name.

AI Prompt: Facebook Post Pack

COPY-AND-PASTE AI PROMPT

Write 10 Facebook posts for [BUSINESS] serving [AUDIENCE] in [LOCATION]. Mix: 4 helpful tips, 2 behind-the-scenes, 2 questions to spark conversation, 1 introduction post for community groups (non-salesy, follows typical group rules), and 1 offer post. Keep each under 120 words with a clear but gentle call to action.

AI Prompt: Helpful Group Reply

COPY-AND-PASTE AI PROMPT

Someone in a community group asked: "[QUESTION]". I'm a [YOUR EXPERTISE]. Write a genuinely helpful answer (under 120 words) that solves their problem without pitching. If appropriate, add one low-key line saying I'm happy to answer follow-up questions.

EXERCISE 5.4: Set up or optimize your Facebook Page and join two relevant groups. Write down each group's promotion rules.

LESSON 5.5

Instagram Marketing

The Big Idea

Instagram is a visual discovery and relationship platform. Businesses commonly use **Reels** (short video) for reach, **carousels** for education and saves, **Stories** for daily connection, and the **profile** as a mini-website.

Optimize Your Profile

- **Professional account** (business or creator) for insights and contact buttons.
- **Name field:** include a keyword ("Maria | Wedding Florist").
- **Bio:** who you help, how, and what to do next, in 2–3 short lines.
- **Link:** your website, lead magnet, or a link page.
- **Highlights:** Services, FAQ, Reviews, About, How to Book.

Content Formats and Their Jobs

Format	Best for
Reels	Reaching new people; tips, transformations, behind the scenes
Carousels	Step-by-step education, checklists, myths vs. facts (often saved)
Stories	Daily updates, polls, Q&A, sharing posts, links
Single photos	Showcasing work, announcements

A Simple Weekly Instagram Plan

- 2 Reels (one tip, one behind-the-scenes)
- 1 carousel (educational)
- Stories on most days (polls, quick updates, sharing your posts)
- 15 minutes daily replying to comments and DMs and engaging with accounts in your niche

Hashtags and Keywords

Use a few relevant hashtags and, importantly, **keywords in your captions and on-screen text**, because Instagram search increasingly uses keywords. Mix niche and local tags where relevant.

EXAMPLE (HYPOTHETICAL): A hypothetical home-organizing business posts a weekly Reel showing a 15-second time-lapse of a pantry being organized (with client permission), a carousel titled "5 Pantry Zones That Make Cooking Easier," and daily Stories with polls ("Which drawer is your messiest?"). Her bio reads: "Home organizing in [City] | Calm, functional spaces | Free 15-min consult ↓".

AI Prompt: Instagram Bio Options

COPY-AND-PASTE AI PROMPT

```
Write 5 Instagram bio options (under 150 characters each) for
[BUSINESS] serving [AUDIENCE] in [LOCATION/online]. Each should state
who I help, the outcome, and a call to action pointing to my link.
Also suggest a name field with a keyword and 5 Highlight titles.
```

AI Prompt: Carousel Builder

COPY-AND-PASTE AI PROMPT

```
Create an Instagram carousel on "[TOPIC]" for [AUDIENCE].
7-9 slides: slide 1 is a scroll-stopping hook, slides 2-8 give one
clear point each (headline + max 25 words), last slide is a call to
action ([CTA]). Then write the caption (under 150 words) with 3-5
relevant hashtags and keywords.
```

EXERCISE 5.5: Rewrite your Instagram bio, create your Highlights, and plan one week of Instagram content using the weekly plan.

LESSON 5.6

TikTok Marketing

The Big Idea

TikTok's recommendation system can show your videos to people who don't follow you, which makes it a potential discovery engine for new businesses. Success usually comes from **authentic, useful, or entertaining short videos**, not polished ads. Reach varies widely from video to video, and nothing about it is guaranteed.

TikTok Fundamentals

- **The hook matters most:** the first 1–3 seconds decide whether people keep watching. State the payoff immediately.
- **Native style:** vertical, natural lighting, talking to the camera, on-screen text, captions.
- **Series content:** recurring formats ("Day 3 of building my business," "Cleaning myths, part 4") give viewers a reason to follow.
- **Comments as content:** reply to comments with video answers.
- **Searchability:** use keywords in captions, on-screen text, and spoken words.
- **Consistency:** posting regularly gives you more data on what works.

Video Formulas That Work for Small Businesses

1. **Tip:** "3 mistakes people make when [task]" → show each quickly.
2. **Process:** satisfying behind-the-scenes of your work.
3. **Myth vs. fact.**
4. **Before/after** (real, with permission, not misleading).
5. **Day in the life** of running your business.
6. **Answer a question:** "You asked: [question]."
7. **Point of view (POV):** relatable customer situations.

The 30-Second Script Structure

- **0–3s Hook:** "If your [problem], try this."
- **3–20s Value:** 2–3 quick steps or points.
- **20–27s Proof/demo:** show it.
- **27–30s CTA:** "Follow for more [topic]" or "Link in bio for the free checklist."

EXAMPLE (HYPOTHETICAL): A hypothetical sourdough baker starts a series called "Bread questions I get every week." Each video answers one question in under 30 seconds while she shapes dough. Her bio links to her pre-order page.

AI Prompt: TikTok Script Generator

COPY-AND-PASTE AI PROMPT

Write 5 TikTok scripts (under 35 seconds each) for [BUSINESS] targeting [AUDIENCE]. Topic area: [TOPIC]. For each include: on-screen hook text, spoken hook (first 3 seconds), 3 quick value points, what to show on camera, a call to action, and a caption with 3-5 keyword hashtags. Natural, conversational tone. No exaggerated claims.

AI Prompt: Hook Variations

COPY-AND-PASTE AI PROMPT

Here's my video idea: [IDEA]. Write 15 hook variations (under 12 words each) using different angles: curiosity, mistake, myth, question, bold statement, relatable moment, quick win. Avoid clickbait that the video won't deliver on.

EXERCISE 5.6: Script, film, and post (or save as drafts) three short videos using the 30-second structure. Note what you learned.

LESSON 5.7

Pinterest Marketing

The Big Idea

Pinterest works more like a **visual search engine** than a typical social network. People use it to plan: home projects, recipes, weddings, outfits, business ideas. Pins can continue to receive views long after posting, and each pin can link to your website, which makes Pinterest valuable for driving traffic to blogs, products, and lead magnets.

Getting Started

1. Create a **Pinterest business account** (free) and claim your website.
2. Optimize your profile with keywords.
3. Create **boards** around topics your customers search, with keyword-rich titles and descriptions.
4. Create **vertical pins** (a 2:3 ratio, such as 1000 × 1500 pixels, is commonly recommended) with clear text overlays.
5. Link each pin to a relevant page on your site.

Pin Design Tips

- Big, readable title text on the image.
- High-quality, bright images.
- Your brand colors and website URL (subtly).
- Multiple pin designs for the same page are common practice.

Pin Copy: Keywords Matter

Use the words people search: "small kitchen organization ideas," "budget wedding checklist." Write a descriptive title and a 1–3 sentence description with natural keywords.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical printable-planner shop creates boards like "Budget Planner Printables," "Meal Planning Templates," and "Home Organization Printables." Each product and blog post gets 3–5 different pin designs linking back to her shop.

AI Prompt: Pinterest Keyword and Board Plan

COPY-AND-PASTE AI PROMPT

```
My business sells [PRODUCTS/SERVICES] to [AUDIENCE]. Suggest:
- 8 Pinterest board names with keyword-rich descriptions (under 300
  characters each)
- 20 search phrases my audience might type on Pinterest
- For my page "[PAGE TITLE + URL TOPIC]", 5 pin titles (under 100
  characters) and 5 pin descriptions (1-3 sentences) using keywords
  naturally
Remind me to check Pinterest's search suggestions to confirm phrases.
```

EXERCISE 5.7: Create a Pinterest business account, set up five boards, and design three pins for one page on your website.

LESSON 5.8

Google Business Profile

The Big Idea

If you serve customers locally (at your location or theirs), a **Google Business Profile (GBP)** is one of the most valuable free marketing tools available. It can help your business appear in Google Search and Google Maps for local searches like "plumber near me."

Who Can Use It

Businesses that make in-person contact with customers during stated hours, either at a physical location or by traveling to customers (a "service-area business"). Purely online businesses generally aren't eligible. Check Google's eligibility guidelines.

Setting Up Your Profile

1. Go to Google's Business Profile page and sign in with a Google account (ideally a business account).
2. Enter your exact business name (don't stuff keywords; this can violate guidelines).
3. Choose the most accurate primary category, plus relevant secondary categories.
4. Add your address, or hide it and set a service area if you serve customers at their locations.
5. Add phone, website, and hours.
6. Complete **verification** (methods vary and may include video verification).

Optimizing Your Profile

- **Description:** clear, natural description of what you do and where.
- **Services/products:** list each with descriptions (and prices if you want).
- **Photos:** real photos of your work, team, vehicle, location. Add new ones regularly.
- **Posts:** share updates, offers, and events.
- **Q&A and messaging:** respond promptly where available.
- **Reviews:** ask happy customers for honest reviews and **respond to every review** professionally.

Review Rules

Never buy reviews, write fake reviews, or offer incentives in exchange for positive reviews. Google's policies prohibit fake engagement, and the FTC's rule on consumer reviews and testimonials prohibits fake reviews and certain review practices. It's fine to politely ask all customers for honest feedback.

EXAMPLE (HYPOTHETICAL): A hypothetical mobile car-detailing service sets up a service-area GBP covering three nearby towns, lists each package as a service, uploads real photos of its work, and sends every customer a short thank-you text with a link to leave an honest review.

AI Prompt: GBP Description and Services

COPY-AND-PASTE AI PROMPT

Write a Google Business Profile description (under 750 characters) for [BUSINESS], a [CATEGORY] serving [SERVICE AREA]. Mention what we do, who we serve, and what makes us different, naturally, without keyword stuffing or promotional phone numbers/URLs. Then write descriptions (under 300 characters each) for these services: [LIST SERVICES].

AI Prompt: Review Responses

COPY-AND-PASTE AI PROMPT

Write professional responses to these Google reviews for my [BUSINESS]. For positive reviews: thank them specifically and personally. For negative reviews: stay calm, acknowledge, avoid sharing private details, and offer to continue the conversation offline. Keep each under 80 words.
Reviews: [PASTE]

EXERCISE 5.8: If eligible, create or claim your Google Business Profile, complete every section, upload at least five real photos, and write your review-request message.

LESSON 5.9

SEO Fundamentals

The Big Idea

In Module 4, you set up on-page SEO for individual pages. Here's the bigger strategy: **SEO is about consistently creating the most helpful answer to the questions your customers search for**, on a technically sound site that others trust and link to.

The Three Pillars of SEO

1. **Content (relevance):** pages and articles that match what people search for and satisfy their intent.
2. **Technical (accessibility):** search engines can crawl and index your site; it loads fast and works on mobile.
3. **Authority (trust):** other reputable sites link to and mention you; your business information is consistent across the web; you demonstrate real experience and expertise.

Understanding Search Intent

- **Informational:** "how to clean grout" → write a helpful guide.
- **Commercial investigation:** "best grout cleaning service vs DIY" → comparison content.
- **Transactional:** "grout cleaning service near me" → service page.
- **Navigational:** "[your business name]" → your homepage.

Match the page type to the intent.

A Beginner SEO Content Plan

1. List 20–30 questions your customers ask (from conversations, "People also ask," and your FAQ).
2. Group them into topics.
3. Create one **pillar page** per main topic (a comprehensive guide) and supporting articles that link to it.
4. Publish consistently (e.g., one helpful article every two weeks).
5. Add your own experience, photos, and examples. That's what makes content distinctive and trustworthy.
6. Link articles to your relevant service or product pages.
7. Monitor Google Search Console monthly: which queries bring impressions and clicks?

Authority Building for Small Businesses

- Consistent business name, address, and phone (NAP) across directories.
- Listings in reputable directories relevant to your industry and area.
- Partnerships with local organizations, guest articles, podcast interviews, community sponsorships.

- Avoid buying links or using "link schemes," which violate search engine guidelines.

AI Prompt: Build My SEO Content Plan

COPY-AND-PASTE AI PROMPT

```
I run [BUSINESS] for [AUDIENCE] in [LOCATION/online]. Here are
questions my customers ask: [LIST]. Create an SEO content plan:
- Group questions into 3-4 topic clusters
- For each cluster, a pillar page title and 4-6 supporting article
  titles
- The search intent for each
- Which of my service/product pages each article should link to
- A realistic publishing schedule for one person
Note which keyword ideas I should confirm with real search data.
```

AI Prompt: Helpful Article Draft

COPY-AND-PASTE AI PROMPT

```
Write a helpful, original article titled "[TITLE]" for [AUDIENCE].
Search intent: [INTENT]. Include: a direct answer in the first
paragraph, clear H2 sections, step-by-step instructions where
relevant, an FAQ, and a link suggestion to my [SERVICE PAGE].
Mark [ADD MY EXPERIENCE] in at least 3 places where I should add a
personal example or photo. Don't invent statistics.
```

EXERCISE 5.9: List 20 customer questions, group them into clusters, and publish (or draft) your first helpful article.

LESSON 5.10

Organic Lead Generation

The Big Idea

Organic lead generation means attracting potential customers without paying for ads: through content, relationships, referrals, partnerships, and direct outreach. It takes time and effort rather than ad spend, which makes it ideal for beginners with small budgets.

Ten Organic Lead Sources

1. **Your personal network:** tell people what you do and who you help. Ask for introductions.
2. **Referrals:** ask happy customers whom they know (consider a referral thank-you, following any applicable rules).
3. **Community groups:** helpful participation online and in person.
4. **Content with a call to action:** every post/article invites a next step.
5. **Lead magnet:** offer a useful freebie in exchange for email (Module 4).
6. **Partnerships:** businesses that serve the same customers but don't compete (a wedding photographer and a florist).
7. **Local events and networking:** chamber of commerce, meetups, markets.
8. **Direct, personalized outreach:** thoughtful messages to well-matched prospects (not spam).
9. **Guest appearances:** podcasts, local media, guest blog posts, workshops at libraries or community centers.
10. **Google Business Profile and SEO** (local and search visibility).

Respectful Outreach Rules

- Research the person or business first. Personalize every message.
- Lead with value or relevance, not a pitch.
- Keep it short. Make it easy to say no.
- Follow up at most once or twice.
- Follow laws on commercial email (CAN-SPAM) and texting (text messages generally require prior consent under the Telephone Consumer Protection Act; don't send marketing texts without permission).

The Simple Lead Tracker

Track every lead in a spreadsheet or CRM: name, source, date, contact info, status (new, contacted, conversation, proposal, won, lost), next step, next follow-up date. What gets tracked gets followed up.

EXAMPLE (HYPOTHETICAL): A hypothetical freelance web designer lists 30 local businesses with outdated or mobile-unfriendly websites. She sends each a short, personalized email noting one specific improvement she noticed, offering a free 10-minute video walkthrough of quick fixes. No pressure, one follow-up. She tracks every response in her spreadsheet.

AI Prompt: Personalized Outreach Message

COPY-AND-PASTE AI PROMPT

```
Write a short, respectful outreach email (under 120 words) to
[PROSPECT TYPE] named [NAME] at [BUSINESS]. I noticed: [SPECIFIC
OBSERVATION]. I help [AUDIENCE] with [SERVICE]. Offer [LOW-PRESSURE
VALUE, e.g., a free quick audit]. Make it personal, not salesy, easy
to decline, and include a simple question as the call to action.
Then write one polite follow-up for 5 days later.
```

AI Prompt: Partnership Ideas

COPY-AND-PASTE AI PROMPT

```
My business: [DESCRIPTION]. My customers: [AUDIENCE].
List 15 types of non-competing businesses or organizations that
serve the same customers. For each, suggest a mutually beneficial
partnership idea (co-hosted event, referral swap, bundled offer,
guest content) and write a short introduction message I could send.
```

EXERCISE 5.10: List 25 potential leads or partners in your lead tracker and send five personalized outreach messages this week.

LESSON 5.11

Creating Promotional Content With AI

The Big Idea

AI can help you produce promotional content (announcements, offers, ads, emails, graphics, video scripts) faster. The key is to keep promotions **truthful, specific, and in your brand voice**, and to avoid tactics that damage trust.

Honest Promotion Rules

- **No fake urgency.** If an offer ends, it should really end. No fake countdown timers.
- **No fake discounts.** Don't show inflated "original" prices you never charged.
- **No invented proof.** Only real reviews and results you can document.
- **No income or results guarantees** you can't back up.
- **Clear terms:** what's included, price, dates, limits.

The Promotion Planning Template

1. **Offer:** what exactly is being promoted?
2. **Audience:** who is it for?
3. **Reason:** why now? (launch, season, new product, real limited capacity)
4. **Channels:** where will you announce it?
5. **Content plan:** announcement, educational posts, reminders, last-call (if a real deadline exists).
6. **Call to action and link.**

AI Visuals: Use Them Well

- Use AI image tools for backgrounds, concepts, patterns, and mood images.
- Use real photos for your actual products, work, and yourself.
- Check AI images for errors (garbled text, extra fingers, distorted objects).
- Don't create images implying endorsements, celebrity use, or results that didn't happen.

AI Prompt: Promotion Campaign Builder

COPY-AND-PASTE AI PROMPT

Create a 2-week promotion plan for [OFFER] for [AUDIENCE].
Reason for the promotion: [REAL REASON]. Real deadline (if any):
[DATE or "none"]. Channels: [PLATFORMS + EMAIL].
Provide: a day-by-day schedule, an announcement post, 3 educational posts that lead into the offer, 2 reminder posts, 1 last-call post (only if there's a real deadline), 3 emails, and 3 image concept descriptions. Honest, no fake urgency, no exaggerated claims.

AI Prompt: Ad Copy Variations

COPY-AND-PASTE AI PROMPT

Write 6 short ad copy variations for [OFFER] targeting [AUDIENCE]:
2 problem-focused, 2 benefit-focused, 2 curiosity/question-focused.
Each: headline (under 40 characters), primary text (under 125 characters), and call-to-action button suggestion. No claims I can't prove, no guarantees, no fake scarcity.

AI Prompt: Image Concept Prompt

COPY-AND-PASTE AI PROMPT

Write 5 detailed prompts for an AI image generator to create on-brand background images for my [BUSINESS] social posts.
Brand colors: [COLORS]. Mood: [MOOD]. Leave clear empty space for text overlays. No people's faces, no logos, no text in the image.

EXERCISE 5.11: Plan one honest promotion using the template and generate all content pieces with AI. Edit each piece for accuracy and voice.

MODULE 5

Module 5 Worksheet

Part A: Target Customer Profile

Element	My target customer
Situation	
Demographics (as relevant)	
Top frustrations (their words)	
Goals	
Objections	
Buying triggers	
Where they spend time	
The "job" they hire me for	

A day in their life: _____

Part B: Brand Style Guide

Element	My brand
Mission	
Positioning statement	
Personality (3–5 words)	

Element	My brand
Voice: do	
Voice: don't	
Primary / accent colors (hex)	
Heading / body fonts	
Photo style	

Part C: Platform Plan

Primary platform: _____ Secondary (optional): _____

Content pillar	Example post 1	Example post 2

Weekly schedule: _____

Part D: Platform Setup Tracker

Platform	Profile optimized?	Notes / rules
Facebook Page + groups		
Instagram		

Platform	Profile optimized?	Notes / rules
TikTok		
Pinterest		
Google Business Profile		

Part E: SEO Clusters

Cluster topic	Pillar page title	Supporting articles

Part F: Promotion Plan

Element	My plan
Offer	
Audience	
Real reason / deadline	
Channels	
Call to action and link	

MODULE 5

Action Checklist

- [ ] Complete your Target Customer Profile and validate it with two real people
- [ ] Write a one-page brand style guide
- [ ] Choose one primary social platform and four content pillars
- [ ] Optimize your Facebook Page and join relevant groups
- [ ] Optimize your Instagram profile and plan one week of content
- [ ] Script and film three short videos
- [ ] Set up Pinterest boards and three pins (if relevant)
- [ ] Create or claim your Google Business Profile (if eligible)
- [ ] Build an SEO content plan and draft your first article
- [ ] Start a lead tracker with 25 names and send five outreach messages
- [ ] Plan one honest promotion with AI-generated, human-edited content

MODULE 5

Knowledge Check

1. What's the best approach to social media for a beginner?
A) Post on every platform daily
B) Choose 1–2 platforms where your customers are and post consistently
C) Buy followers to look established
D) Only post ads

2. What does the "jobs to be done" idea ask?
A) What jobs your customer has had
B) What "job" the customer hires your product to do for them
C) Which employees to hire
D) What tasks to automate

3. Pinterest is best described as:
A) A private messaging app
B) A visual search and planning engine
C) A video livestreaming platform
D) A professional networking site

4. Who is typically eligible for a Google Business Profile?
A) Any website
B) Businesses that make in-person contact with customers at a location or within a service area
C) Only restaurants
D) Only businesses with employees

5. Which review practice is acceptable?
A) Writing reviews for yourself
B) Paying for 5-star reviews
C) Politely asking all customers for honest reviews
D) Deleting all negative reviews by offering refunds for removal

6. True or false: A fake countdown timer is acceptable if it increases sales.

7. Which search intent fits "grout cleaning service near me"?
A) Informational
B) Navigational
C) Transactional
D) Entertainment

8. Under the TCPA, what generally applies to marketing text messages?

A) Anyone can be texted anytime

B) Prior consent is generally required

C) Only emails need consent

D) Texts are unregulated

MODULE 5

Answer Key

1. **B.** Focus and consistency beat being everywhere.
2. **B.** It focuses on the outcome customers want.
3. **B.** Pinterest works like a visual search engine for planning and ideas.
4. **B.** Eligibility requires in-person contact with customers; check Google's current guidelines.
5. **C.** Asking for honest reviews is fine; fake or incentivized positive reviews are not.
6. **False.** Fake urgency is deceptive and erodes trust; it can also create legal risk.
7. **C.** The searcher wants to hire a service now.
8. **B.** Marketing texts generally require prior consent; check current TCPA rules.

MODULE

06

SELLING AND GETTING CUSTOMERS

6.1 Developing an Offer

6.2 Understanding Pricing

6.3 Creating Sales Pages

6.4 Building Sales Funnels

6.5 Customer Communication

6.6 Following Up With Prospects

6.7 Understanding Conversion Rates

6.8 Improving the Customer Experience

MODULE 6: SELLING AND GETTING CUSTOMERS

MODULE OVERVIEW: Marketing gets attention; selling turns attention into customers. Selling doesn't have to feel pushy. Done well, it's simply helping the right people decide whether your offer will solve their problem. In this module you'll design a clear offer, set prices with confidence, write a sales page, build a simple sales funnel, communicate professionally, follow up without being annoying, understand conversion rates, and create a customer experience people want to recommend.

In this module:

- Lesson 6.1: Developing an Offer
- Lesson 6.2: Understanding Pricing
- Lesson 6.3: Creating Sales Pages
- Lesson 6.4: Building Sales Funnels
- Lesson 6.5: Customer Communication
- Lesson 6.6: Following Up With Prospects
- Lesson 6.7: Understanding Conversion Rates
- Lesson 6.8: Improving the Customer Experience

> **NOTE:** All examples and numbers in this module are hypothetical and used only to illustrate calculations. Your prices, conversion rates, and results will depend on your market, offer, and execution.

LESSON 6.1

Developing an Offer

The Big Idea

An **offer** is more than a product or service. It's the complete package: what the customer gets, the result it's designed to help them achieve, how it's delivered, the price, the terms, and the reasons to trust it. Two businesses can sell the same service, but the one with the clearer, more compelling offer usually wins.

The Seven Parts of a Strong Offer

1. **Target customer:** who exactly is it for?
2. **Core promise (outcome):** what result or change is it designed to create? (Be specific but honest; describe the intended outcome without guaranteeing it.)
3. **Deliverables:** what exactly do they get?
4. **Delivery method and timeline:** how and when?
5. **Price and payment terms.**
6. **Risk reducers:** a fair refund policy, satisfaction policy, a free consultation, a trial, or clear scope.
7. **Bonuses or extras (optional):** genuinely useful additions, not filler.

Productizing a Service

A **productized service** has a fixed scope, fixed price, and defined timeline. Instead of "I do social media," it's "The Launch Pack: 12 branded post templates + 30 captions, delivered in 7 days, $___." Productized offers are easier to explain, easier to buy, and easier to deliver consistently.

The Offer Ladder

Many businesses create a range of offers at different commitment levels:

- **Free:** lead magnet, free consult, helpful content.
- **Entry offer:** a small, low-risk first purchase (a mini-audit, a template, a starter session).
- **Core offer:** your main product or service.
- **Premium offer:** a higher-touch or more comprehensive option.
- **Ongoing offer:** a subscription, retainer, or maintenance plan.

You don't need every rung on day one. Start with one core offer, then add rungs.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical dog-walking business offer: "Midday Walk Plan for working dog owners in [Neighborhood]. 30-minute walks Monday through Friday, photo update after every walk, same walker each week when possible, free meet-and-greet before starting, cancel with one week's notice." The offer is specific, easy to understand, and reduces worry for the customer.

Step-by-Step: Build Your Core Offer

1. Revisit your target customer's top problem (Module 5).
2. Write the outcome your offer is designed to create.
3. List exact deliverables and the timeline.
4. Decide on risk reducers you can honestly provide.
5. Give it a clear name.
6. Write it as a one-paragraph offer statement.
7. Share it with three people in your target audience and ask what's unclear.

AI Prompt: Build My Offer

COPY-AND-PASTE AI PROMPT

Help me design a clear offer. Business: [DESCRIPTION]. Target customer: [WHO]. Their main problem: [PROBLEM].
What I can deliver: [SKILLS/CAPACITY].
Create 3 offer options (an entry offer, a core offer, and a premium offer). For each: name, intended outcome (no guarantees), exact deliverables, timeline, suggested pricing approach, and an honest risk reducer. Then write a one-paragraph description of the core offer.

AI Prompt: Productize My Service

COPY-AND-PASTE AI PROMPT

I currently offer custom [SERVICE] with variable scope. Help me turn it into 2-3 productized packages with fixed scope, fixed timeline, clear limits (revisions, response times), and names. Show them in a comparison table and list what's NOT included in each.

EXERCISE 6.1: Complete the "Offer Builder" on your worksheet and get feedback from three people in your audience.

LESSON 6.2

Understanding Pricing

The Big Idea

Pricing affects your profit, your positioning, and the customers you attract. Beginners often underprice out of fear, then burn out doing too much work for too little money. Good pricing starts with your **costs**, considers the **market**, and is anchored in the **value** to the customer.

Three Pricing Approaches

1. Cost-plus pricing. Calculate your total costs and add a profit margin. Essential as a floor: you must know you're not losing money.

2. Market-based pricing. Look at what similar businesses charge. Helps you understand customer expectations and position yourself (budget, mid-range, premium).

3. Value-based pricing. Price based on the value of the outcome to the customer. A website that helps a business book more appointments may be worth more to that business than the hours it takes to build.

Most small businesses use a blend: costs set the floor, the market sets the range, and value guides where you land within it.

Calculating Your Minimum Price (Services)

1. **Monthly income target** (what you need to pay yourself): $____
2. **Monthly business expenses:** $____
3. **Tax set-aside** (estimate with your tax professional): $____
4. **Total needed per month** = 1 + 2 + 3
5. **Billable hours per month** (realistically, many solo owners can't bill every working hour; account for marketing, admin, and sales time).
6. **Minimum hourly rate** = Total needed ÷ billable hours.

Hypothetical illustration only: if someone needed $5,000 per month in total and expected 80 billable hours, their minimum would be $5,000 ÷ 80 = $62.50 per hour. Your numbers will differ.

Calculating Price for Products

- **Cost of goods (COGS):** materials, production, packaging.
- **Fees:** payment processing, platform/marketplace fees.
- **Shipping costs** (if you cover them).
- **Overhead share:** a portion of monthly expenses.
- **Profit margin.**

Gross margin = (Price − COGS) ÷ Price. *Hypothetical example:* a product priced at $40 with $16 in COGS has a gross margin of ($40 − $16) ÷ $40 = 60%.

Pricing Psychology (Use Ethically)

- **Tiered packages:** offering good/better/best options helps customers choose.
- **Anchoring:** presenting a comprehensive premium option first can make other options feel more accessible. Only show real options you'll actually sell.
- **Clear value framing:** explain what's included and the problem it solves.
- **Avoid deceptive tactics:** fake "was" prices, fake scarcity, hidden fees. The FTC's guidance on deceptive pricing addresses fictitious former prices.

Raising Prices

Raise prices when: you're consistently booked, you've improved the offer, costs increased, or you're attracting the wrong customers. Give existing customers fair notice.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical freelance bookkeeper checks her costs and finds her current price barely covers expenses and taxes. Local competitors list monthly bookkeeping packages in a higher range. She creates three tiers based on transaction volume, raises her starting price to a level that covers her minimum rate, and notifies her two existing clients 60 days in advance.

AI Prompt: Pricing Calculator

COPY-AND-PASTE AI PROMPT

```
Help me calculate pricing for my [SERVICE/PRODUCT].
My numbers:
- Monthly income target: [AMOUNT]
- Monthly business expenses: [AMOUNT]
- Tax set-aside estimate: [AMOUNT or %]
- Billable hours per month (services): [NUMBER]
- Cost per unit, fees, shipping (products): [AMOUNTS]
- Competitor price range I've found: [RANGE]
Show the math step by step: minimum hourly rate or unit price,
gross margin at 3 price points, and where each price positions me
in the market. Explain trade-offs. Don't guarantee sales at any price.
```

AI Prompt: Package Tiers

COPY-AND-PASTE AI PROMPT

Create good/better/best pricing tiers for [OFFER] for [AUDIENCE]. My minimum viable price is [AMOUNT]. Market range: [RANGE]. For each tier: name, who it's for, inclusions, and price. Explain the reasoning. Make the differences between tiers meaningful, not artificial.

EXERCISE 6.2: Use the worksheet's pricing calculator to find your minimum price, research five competitors' prices, and set your launch price.

LESSON 6.3

Creating Sales Pages

The Big Idea

A **sales page** is a single page dedicated to one offer, with one goal: help the right visitor decide to buy (or book). It's longer and more focused than a typical service page because it must answer every important question a buyer has.

The Sales Page Structure

1. **Headline:** the core outcome for the specific audience.
2. **Subheadline:** how it works or what makes it different.
3. **Call to action (above the fold).**
4. **The problem:** describe the customer's situation and frustrations in their words.
5. **The cost of the problem:** what happens if nothing changes (without fear-mongering).
6. **The solution:** introduce your offer.
7. **What's included:** deliverables, modules, features, with benefits.
8. **How it works:** simple steps.
9. **Who it's for and not for:** honest qualifiers build trust.
10. **About you:** why you're qualified (real experience and credentials only).
11. **Proof:** genuine reviews, real examples of work (with permission). If you're new and have none, skip this or show your process and expertise instead. Never invent it.
12. **Pricing:** clear price, what's included, payment options.
13. **Risk reducer:** refund policy, guarantee terms you'll honor, or free consultation.
14. **FAQ:** objections and logistics.
15. **Final call to action.**

Copywriting Principles

- **Clarity beats cleverness.**
- **Benefits over features:** "Weekly reports" (feature) → "Know exactly where your money goes every week" (benefit).
- **Specific beats vague:** "Delivered in 7 days" beats "fast delivery."
- **Use the customer's words** from your research.
- **One reader, one offer, one action.**
- **Honesty:** no income claims, no exaggerated results, no fake scarcity. If you mention results, keep them typical and documented, with any needed disclosures.

AI Prompt: Sales Page Draft

COPY-AND-PASTE AI PROMPT

```
Write a sales page for [OFFER NAME] for [AUDIENCE].
Inputs:
- Main problem (customer words): [QUOTES]
- Intended outcome: [OUTCOME]
- Deliverables: [LIST]
- Process: [STEPS]
- Price and payment options: [DETAILS]
- Refund/risk reducer: [POLICY]
- About me (real facts only): [BACKGROUND]
Follow this structure: headline (5 options), subheadline, problem,
cost of the problem, solution, what's included (with benefits), how
it works, who it's for/not for, about, [PROOF PLACEHOLDER], pricing,
risk reducer, 8-question FAQ, final CTA.
No guarantees of results, no invented testimonials or statistics.
```

AI Prompt: Features to Benefits

COPY-AND-PASTE AI PROMPT

```
Turn each feature below into a clear customer benefit, using the
"so you can..." method. Give 2 versions per feature: one practical,
one emotional. Audience: [WHO].
Features: [LIST]
```

EXERCISE 6.3: Write a complete sales page draft for your core offer. Then read it out loud and remove anything that isn't true, clear, or necessary.

LESSON 6.4

Building Sales Funnels

The Big Idea

A **sales funnel** is the path someone takes from first hearing about you to becoming a customer. It's called a funnel because at each step, fewer people continue. Building a funnel means deliberately designing each step so the right people move forward smoothly.

The Basic Funnel Stages

1. **Awareness:** they discover you (social content, search, referral, ad).
2. **Interest:** they engage (visit your site, follow you, read a post).
3. **Lead capture:** they give you contact info (lead magnet, quote request, booking).
4. **Nurture:** you build trust (email sequence, helpful follow-up, consultation).
5. **Decision:** they buy (sales page, checkout, proposal).
6. **Post-purchase:** onboarding, delivery, review request, referrals, repeat purchase.

Three Simple Funnel Blueprints

Service business funnel: Social post or search → Website service page → Free consultation booking → Consultation call → Proposal → Follow-up → Signed agreement and deposit.

Digital product funnel: Content (video, pin, post) → Lead magnet opt-in → Welcome email sequence (3–5 emails) → Sales page → Checkout → Delivery email → Follow-up for review and next product.

Local business funnel: Google Business Profile or neighborhood group → Website or direct message → Quote request → Quick response with quote → Booking → Service → Review request → Rebooking reminder.

The Welcome Email Sequence (Digital Product Funnel)

- **Email 1 (immediately):** deliver the freebie, introduce yourself, set expectations.
- **Email 2 (day 2):** a helpful tip or quick win related to the freebie.
- **Email 3 (day 4):** your story or approach; address a common mistake.
- **Email 4 (day 6):** introduce your offer and how it helps.
- **Email 5 (day 8):** answer objections/FAQ; clear call to action.

Build It Simply

Your first funnel can be built with tools you already have: your website, a form, an email marketing tool, and a payment link. Don't buy expensive funnel software until you've proven the steps work.

EXAMPLE (HYPOTHETICAL): A hypothetical meal-prep coach posts short videos with recipe tips. Each video points to a free "5-Day Family Meal Prep Plan" on her site. Subscribers receive five emails over eight days, then an invitation to her paid four-week coaching program. She tracks how many people move through each step.

AI Prompt: Map My Funnel

COPY-AND-PASTE AI PROMPT

```
Map a simple sales funnel for [BUSINESS] selling [OFFER] at [PRICE]
to [AUDIENCE]. My main traffic source is [SOURCE].
For each stage (awareness, interest, lead capture, nurture,
decision, post-purchase), describe: what the customer sees, the tool
I'll use, the content needed, and the metric to track. Keep it
buildable by one person with free or low-cost tools.
```

AI Prompt: Write My Welcome Sequence

COPY-AND-PASTE AI PROMPT

```
Write a 5-email welcome sequence for people who downloaded my free
[LEAD MAGNET] and may be interested in [OFFER] at [PRICE].
Schedule: day 0, 2, 4, 6, 8. Purpose of each: deliver + welcome,
quick win, story + common mistake, introduce offer, FAQ + CTA.
Each email: subject line (2 options), preview text, body under 200
words. Warm and helpful; no pressure tactics, fake deadlines, or
income claims. Include an unsubscribe reminder note for my footer.
```

EXERCISE 6.4: Draw your funnel on your worksheet, list the tools for each stage, and draft your welcome sequence or consultation process.

LESSON 6.5

Customer Communication

The Big Idea

Professional, timely, clear communication is a competitive advantage, especially for small businesses. Customers often choose a provider simply because they responded first and clearly.

Communication Standards to Set

- **Response time:** e.g., within one business day (and say so).
- **Channels:** which ones you use for what (email for quotes, text for scheduling, etc.).
- **Business hours:** when you're available.
- **Tone:** consistent with your brand voice.

Handling Inquiries: The 4-Part Reply

1. **Thank and acknowledge** their specific request.
2. **Answer** their question directly.
3. **Ask** one or two clarifying questions if needed.
4. **Next step:** propose a clear action (book a call, approve a quote, choose a time).

Running a Discovery or Consultation Call

1. **Set the agenda** (2 minutes): "I'll ask a few questions, share how I can help, and we'll see if it's a fit."
2. **Ask questions** (10–15 minutes): situation, goals, challenges, what they've tried, timeline, budget range.
3. **Summarize** what you heard. This shows you listened.
4. **Recommend** the offer that fits (or refer them elsewhere if it doesn't).
5. **Address questions.**
6. **Agree on next steps** and timing.

Proposals and Agreements

For services, use a written proposal or agreement covering scope, deliverables, timeline, price, payment terms, revisions, cancellations, and responsibilities. Templates are available, but consider having an attorney review your standard agreement.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical photographer receives an inquiry at 9 p.m. She has a saved template; the next morning she personalizes it: thanks the person, confirms her availability for their date, asks the location and number of hours, and links to her booking calendar for a 15-minute call.

AI Prompt: Discovery Call Script

COPY-AND-PASTE AI PROMPT

Write a 20-minute discovery call script for [BUSINESS] offering [OFFER] to [AUDIENCE]. Include: an agenda opener, 10 questions (situation, goals, challenges, past attempts, timeline, budget), a summary template, how to recommend my offer naturally, how to respond if it's not a fit, and how to close with a clear next step. Conversational, helpful, never pushy.

AI Prompt: Proposal Outline

COPY-AND-PASTE AI PROMPT

Create a one-page proposal template for [SERVICE] including: client goals summary, recommended package, scope and deliverables, timeline, investment and payment terms, what's not included, next steps to get started, and a section for acceptance. Use [PLACEHOLDERS]. Note that I should have an attorney review any contract terms.

EXERCISE 6.5: Write your communication standards and create three saved templates: inquiry reply, consultation confirmation, and proposal email.

LESSON 6.6

Following Up With Prospects

The Big Idea

Many sales don't happen on first contact. People get busy, forget, or need time to decide. Thoughtful follow-up isn't annoying; it's often helpful. The key is to **add value, stay respectful, and stop when asked.**

The Follow-Up Framework

- **Follow-up 1 (2–3 days after a proposal or conversation):** check in, answer questions, restate the next step.
- **Follow-up 2 (about a week later):** share something helpful (a relevant tip, an example, an answer to a likely question).
- **Follow-up 3 (about two weeks later):** a polite "close the loop" message, leaving the door open.
- **After that:** add them to your email list (only with consent) or set a reminder to check in months later if appropriate.

Follow-Up Message Principles

- Reference the specific conversation.
- Keep it short.
- Make it easy to reply (a yes/no question).
- Never guilt, pressure, or invent deadlines.
- Respect "no" and unsubscribe requests immediately.

Track Every Follow-Up

Use your lead tracker (Module 5) with a "next follow-up date" column. Review it daily. Tracked follow-ups are far less likely to slip through the cracks.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical web designer sends a proposal on Monday. On Thursday, she checks in: "Any questions about the proposal? Happy to hop on a quick call." The next week she sends a short note with a two-minute video showing how the new homepage layout would look on mobile. Ten days later: "I'll close this out for now so I'm not cluttering your inbox. If the timing changes, just reply here."

AI Prompt: Follow-Up Sequence

COPY-AND-PASTE AI PROMPT

Write a 3-message follow-up sequence for a prospect who [SITUATION: received a proposal / had a consultation / asked for a quote] for [OFFER]. Context from our conversation: [DETAILS].
Message 1 (day 3): friendly check-in. Message 2 (day 8): add value with [HELPFUL RESOURCE IDEA]. Message 3 (day 15): polite close-the-loop. Each under 90 words, personal, no pressure, ending with an easy question.

AI Prompt: Re-Engage Old Leads

COPY-AND-PASTE AI PROMPT

I have [NUMBER] past leads who inquired about [OFFER] [TIMEFRAME] ago but didn't buy. Write a short, genuine re-engagement email (under 120 words) that mentions something new or useful [WHAT'S NEW], invites a reply, and makes it easy to opt out. No fake urgency or discounts I don't actually offer.

EXERCISE 6.6: Add a "next follow-up date" to every open lead in your tracker and write your three-message follow-up templates.

LESSON 6.7

Understanding Conversion Rates

The Big Idea

A **conversion rate** is the percentage of people who take a desired action. It's one of the most useful numbers in your business because it shows where people drop off in your funnel and where improvements will have the biggest impact.

The Formula

Conversion rate = (Number of conversions ÷ Number of visitors or opportunities) × 100

Hypothetical examples (for practicing the math only):

- 400 visitors to a lead magnet page and 60 sign-ups: 60 ÷ 400 × 100 = 15% opt-in rate.
- 20 consultation calls and 6 new clients: 6 ÷ 20 × 100 = 30% close rate.
- 1,000 sales page visitors and 12 purchases: 12 ÷ 1,000 × 100 = 1.2% conversion rate.

Conversion Points to Track

Stage	Conversion to measure
Content → website	Click-through rate
Landing page → lead	Opt-in rate
Lead → consultation	Booking rate
Consultation → client	Close rate
Sales page → purchase	Purchase conversion rate
Customer → repeat	Repeat purchase rate

Why "Average" Benchmarks Can Mislead

You'll find many published "average conversion rates" online. They vary enormously by industry, price, traffic source, and offer, and they're often based on data that doesn't match your situation. **Your own numbers over time are the most useful benchmark.** Measure, improve, and compare against your own past performance.

How to Improve Conversion Rates

1. **Find the biggest drop-off** in your funnel.
2. **Form a hypothesis:** "Visitors don't understand the offer quickly enough."

3. **Make one change:** clearer headline, simpler form, better photos, answering an objection, faster response time.
4. **Measure** over a meaningful number of visitors or opportunities.
5. **Keep what works**, revert what doesn't.

With small numbers of visitors, results can swing wildly by chance. Avoid drawing big conclusions from a handful of visits; gather more data before deciding.

Common Conversion Killers

- Unclear headline or offer.
- Slow or broken pages, especially on mobile.
- Too many choices or calls to action.
- Missing price or hidden costs.
- No trust signals or unanswered objections.
- Complicated checkout or long forms.
- Slow response to inquiries.

AI Prompt: Diagnose My Funnel

COPY-AND-PASTE AI PROMPT

```
Here are my funnel numbers for the last [PERIOD]:
- Visitors to [PAGE]: [X]
- Leads/sign-ups: [X]
- Consultations booked: [X]
- Sales: [X]
Calculate the conversion rate at each step and identify the biggest
drop-off. Suggest 5 hypotheses for why people drop off there, and
for each, one specific change I could test. Remind me if my sample
sizes are too small to draw firm conclusions.
```

AI Prompt: Page Conversion Review

COPY-AND-PASTE AI PROMPT

```
Review this sales/landing page copy as a conversion-focused editor.
Identify: unclear messaging, missing information, unanswered
objections, weak calls to action, and trust gaps. Rank the top 5
fixes by likely impact and effort. Do not suggest fake urgency,
fake reviews, or exaggerated claims.
Page: [PASTE]
```

EXERCISE 6.7: Fill in the Funnel Metrics table on your worksheet with your current numbers (even if they're small), find the biggest drop-off, and choose one improvement to test.

LESSON 6.8

Improving the Customer Experience

The Big Idea

Customer experience (CX) is how customers feel about every interaction with your business, from first discovering you to long after their purchase. Great experiences tend to lead to repeat business, referrals, and positive reviews, which can lower the cost of finding new customers over time.

Map the Customer Journey

List every touchpoint:

1. Discovering you
2. Visiting your website or profile
3. Contacting you
4. Receiving a quote or making a purchase
5. Onboarding (what happens right after they pay)
6. Delivery of the product or service
7. Support and problem resolution
8. Follow-up after completion
9. Rebooking or repurchasing

For each touchpoint, ask: *What could feel confusing, slow, or disappointing? What small thing could make it delightful?*

Small Touches That Make a Big Difference

- A clear welcome email that explains what happens next.
- Proactive updates ("Your order shipped," "I'm on my way").
- A simple onboarding checklist or guide.
- Delivering slightly earlier than promised (when you reliably can).
- A personal thank-you note.
- Remembering details about repeat customers.
- Fixing mistakes quickly and generously.

Collecting Feedback

- Send a short feedback form after delivery (3 questions maximum).
- Ask: "What's one thing we could do better?"
- Read feedback monthly and act on patterns.

- Share improvements with customers ("You asked, we listened").

Asking for Reviews and Referrals

Ask at the moment of highest satisfaction (right after a successful delivery). Make it easy with a direct link. Ask for honest reviews; never pay for positive ones or filter who can review based on expected sentiment.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical house-cleaning business maps its journey and notices new clients feel anxious before the first visit. It creates a "What to Expect" email with the cleaner's first name, arrival window, what's included, and how to prepare. It also sends a text when the cleaner is 15 minutes away. These small changes address the most common worry clients expressed.

AI Prompt: Customer Journey Audit

COPY-AND-PASTE AI PROMPT

```
Here's how a customer currently experiences my business, step by step: [DESCRIBE EACH STEP]. For each touchpoint, identify possible friction or confusion, and suggest one low-cost improvement and one "delight" idea. Then write the onboarding/welcome message I should send immediately after purchase.
```

AI Prompt: Feedback Form and Review Request

COPY-AND-PASTE AI PROMPT

```
Create: (1) a 3-question customer feedback form for [BUSINESS] after [SERVICE/PRODUCT DELIVERY]; (2) a short thank-you message asking for an honest review with [REVIEW LINK]; and (3) a referral request message. Warm, brief, and pressure-free. No incentives for positive reviews.
```

> **EXERCISE 6.8:** Map your customer journey on your worksheet, identify three friction points, and implement one improvement this week.

MODULE 6

Module 6 Worksheet

Part A: Offer Builder

Element	My offer
Offer name	
Target customer	
Intended outcome (no guarantees)	
Deliverables	
Delivery method and timeline	
Price and payment terms	
Risk reducer	
Bonuses (optional)	

Feedback from 3 people: _____

Part B: Pricing Calculator

Line	Amount
1. Monthly income target	$
2. Monthly business expenses	$
3. Tax set-aside estimate	$

Line	Amount
4. Total needed (1 + 2 + 3)	$
5. Billable hours per month	
6. Minimum hourly rate (4 ÷ 5)	$

Competitor	Offer	Price	Notes

My launch price: $_____ Why: _____

Part C: My Funnel

Stage	What they see	Tool	Metric
Awareness			
Interest			
Lead capture			
Nurture			
Decision			
Post-purchase			

Part D: Communication Standards

Response time: _____ Channels: _____ Hours: _____

Part E: Funnel Metrics

Step	Number in	Number out	Conversion rate
Visitors → leads			%
Leads → consultations			%
Consultations → customers			%
Page visitors → purchases			%

Biggest drop-off: _____ Change I'll test: _____

Part F: Customer Journey

Touchpoint	Friction	Improvement

MODULE 6

Action Checklist

- [ ] Write your core offer with all seven parts
- [ ] Calculate your minimum price and research competitor prices
- [ ] Set your launch price and package tiers
- [ ] Write a full sales page draft
- [ ] Map your sales funnel and the tools for each stage
- [ ] Write a welcome email sequence or consultation process
- [ ] Create inquiry, consultation, and proposal templates
- [ ] Write a three-message follow-up sequence
- [ ] Add follow-up dates to all open leads
- [ ] Calculate conversion rates for your funnel steps
- [ ] Map the customer journey and implement one improvement
- [ ] Create a feedback form and review request message

MODULE 6

Knowledge Check

1. What is a productized service?
A) A physical product
B) A service with fixed scope, price, and timeline
C) A free consultation
D) A service with unlimited revisions

2. Which pricing approach sets your absolute minimum price?
A) Value-based
B) Cost-plus (knowing your costs)
C) Copying the cheapest competitor
D) Guessing

3. If 300 people visit a page and 15 sign up, what's the opt-in rate?
A) 3%
B) 5%
C) 15%
D) 20%

4. Which belongs on an honest sales page when you're new and have no reviews?
A) Invented testimonials
B) Stock photos labeled as clients
C) Your process, real experience, and a fair risk reducer
D) Fake "as seen on" logos

5. What's the first step to improve conversion rates?
A) Change everything at once
B) Find the biggest drop-off in your funnel
C) Add a countdown timer
D) Lower your price immediately

6. True or false: Published "average conversion rates" are the best benchmark for your business.

7. What's a good follow-up practice?
A) Daily messages until they respond
B) Short, personal messages that add value and respect "no"
C) Inventing a deadline
D) Never following up

8. When is the best time to ask for a review?

A) Before delivery

B) Right after a successful delivery or experience

C) Only after a complaint

D) Six months later

MODULE 6

Answer Key

1. **B.** Fixed scope, fixed price, defined timeline.
2. **B.** Knowing your costs ensures you don't price below what you need to sustain the business.
3. **B.** 15 ÷ 300 × 100 = 5%.
4. **C.** Show real process and experience; never invent proof.
5. **B.** Focus improvement where the most people drop off.
6. **False.** Your own numbers over time are more meaningful.
7. **B.** Helpful, respectful, and limited follow-up.
8. **B.** Ask when satisfaction is highest.

MODULE

07

BUILD AN ONLINE STORE

7.1 Digital Products

7.2 Physical Products

7.3 Print-on-Demand

7.4 E-commerce Fundamentals

7.5 Product Research

7.6 Product Descriptions

7.7 Checkout Systems

7.8 Fulfillment

7.9 Customer Support

MODULE 7: BUILD AN ONLINE STORE

MODULE OVERVIEW: Selling products online is one of the most popular ways to start a business, and one of the most misunderstood. This module walks through the three main product types (digital, physical, and print-on-demand), the fundamentals of running an e-commerce store, how to research products, write descriptions that sell, set up checkout, handle fulfillment, and deliver customer support that earns repeat buyers.

In this module:

- Lesson 7.1: Digital Products
- Lesson 7.2: Physical Products
- Lesson 7.3: Print-on-Demand
- Lesson 7.4: E-commerce Fundamentals
- Lesson 7.5: Product Research
- Lesson 7.6: Product Descriptions
- Lesson 7.7: Checkout Systems
- Lesson 7.8: Fulfillment
- Lesson 7.9: Customer Support

> **NOTE:** Selling products involves legal and tax obligations (sales tax, product safety, consumer protection, intellectual property). This module gives general education only; it is not legal or tax advice. Check your state's department of revenue, FTC.gov, CPSC.gov, and USPTO.gov, and consult professionals as needed.

LESSON 7.1

Digital Products

The Big Idea

Digital products are files or online access that customers download or use: templates, printables, e-books, guides, spreadsheets, presets, design assets, music, courses, and software. They have no inventory or shipping, and once created they can be sold many times. The trade-off: they're often easy for others to create too, so quality, specificity, and marketing matter a lot.

Popular Digital Product Types

Type	Examples
Templates	Spreadsheets, Canva templates, resume templates, business documents
Printables	Planners, checklists, worksheets, wall art
Guides	E-books, how-to guides, playbooks
Education	Mini-courses, video lessons, workshops
Creative assets	Photo presets, fonts (with proper licensing), graphics, music loops
Tools	Calculators, Notion dashboards, spreadsheets with formulas

What Makes a Digital Product Sell

1. **Solves a specific problem** for a specific person ("Wedding budget tracker for couples under $20K" vs. "Budget template").
2. **Saves time** compared to making it themselves.
3. **Looks professional** and is easy to use.
4. **Includes clear instructions.**
5. **Shows exactly what's included** through accurate previews.

How to Create Your First Digital Product

1. Choose a problem from your customer research.
2. Decide the simplest format that solves it.
3. Outline the contents (use AI to help).
4. Create it in a tool you know (Google Docs/Sheets, Canva, Notion, etc.).
5. Test it with 2–3 people from your audience. Fix confusing parts.
6. Create preview images/mockups that accurately show the product.

7. Write a product description (Lesson 7.6).
8. Set up delivery through your store platform or a digital product platform.

Licensing and Intellectual Property

- Only use fonts, images, and graphics you have the right to use **commercially** in products for resale. Check each license.
- Decide your customer license: personal use only, or commercial use allowed? State it clearly.
- Don't copy others' designs, text, or courses.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical teacher creates a "Substitute Teacher Binder" template pack: editable pages for class rosters, routines, emergency procedures, and seating charts. She tests it with two colleagues, simplifies the instructions based on their feedback, creates accurate preview images, and lists it on her own site and a marketplace for educators.

AI Prompt: Digital Product Ideas

COPY-AND-PASTE AI PROMPT

```
My audience is [AUDIENCE] and their top problems are [PROBLEMS].
Generate 15 digital product ideas that solve specific problems.
For each: product name, format, what's inside, which tool I could
create it in, and how long it might take a beginner to make.
Rank the top 5 by usefulness to the audience and ease of creation.
```

AI Prompt: Outline My Digital Product

COPY-AND-PASTE AI PROMPT

```
Create a detailed outline for a digital product called "[NAME]"
for [AUDIENCE] in [FORMAT]. Include every page/section/tab, what
each contains, instructions the buyer will need, and a quick-start
guide. Suggest what to include to make it clearly better than a
free alternative.
```

> **EXERCISE 7.1:** Choose one digital product idea, outline it, and create a first version or prototype.

LESSON 7.2

Physical Products

The Big Idea

Physical products are tangible items customers receive. They can build strong brands and loyal customers, but they involve **inventory, cash tied up in stock, shipping, returns, and product safety.** Start small and test before buying large quantities.

Ways to Source Physical Products

1. **Make them yourself:** handmade goods (candles, jewelry, baked goods where legal, crafts). Higher control, limited by your time.
2. **Wholesale:** buy finished products from manufacturers or distributors and resell them. Requires research into suppliers and margins.
3. **Private label:** a manufacturer produces a product with your branding. Higher upfront costs and minimum order quantities.
4. **Dropshipping:** a supplier ships products directly to your customer. Low upfront cost, but often thin margins, longer shipping times, and less quality control. Vet suppliers carefully.
5. **Print-on-demand:** covered in Lesson 7.3.

Key Considerations

- **Unit economics:** price minus COGS, shipping, packaging, platform and payment fees. Know your profit per unit before you buy inventory.
- **Minimum order quantities (MOQs):** how much you must buy at once.
- **Samples:** always order samples before committing.
- **Storage:** where will you keep inventory?
- **Product safety and compliance:** some categories (children's products, cosmetics, food, electronics) have specific federal and state regulations. Check CPSC.gov (Consumer Product Safety Commission) and FDA.gov as relevant.
- **Labeling claims:** claims like "Made in USA," "organic," or health claims have specific legal standards. The FTC has guidance on "Made in USA" claims.
- **Insurance:** consider product liability insurance.

Start Small Strategy

1. Order samples from 2–3 suppliers or make a small batch.
2. Sell a limited quantity (pre-orders, local markets, a small online drop).
3. Gather feedback and track which items sell.
4. Reorder winners; drop or improve slow sellers.

EXAMPLE (HYPOTHETICAL): A hypothetical founder wants to sell eco-friendly kitchen sponges. Instead of ordering thousands of units, she orders samples from three suppliers, tests durability at home, and buys a small first batch from the best one. She sells at two local markets and online, asks buyers for feedback, and decides whether to reorder based on real sales.

AI Prompt: Unit Economics Calculator

COPY-AND-PASTE AI PROMPT

```
Help me calculate unit economics for a physical product.
- Selling price: [PRICE]
- Product cost per unit: [COST]
- Packaging per unit: [COST]
- Shipping cost I pay per order: [COST]
- Platform fee: [% or amount]
- Payment processing fee: [% + fixed amount]
- Average units per order: [NUMBER]
Show profit per unit and per order, gross margin, and break-even
number of units to cover a first inventory order of [AMOUNT].
Show the math step by step.
```

AI Prompt: Supplier Questions

COPY-AND-PASTE AI PROMPT

```
I'm evaluating suppliers for [PRODUCT]. Write a list of 15 questions
to ask suppliers about: pricing tiers, MOQs, samples, production
time, quality control, materials and safety certifications,
packaging, shipping, defects/returns, and communication. Also write
a short, professional first message requesting a quote and samples.
```

EXERCISE 7.2: If you're selling physical products, complete the Unit Economics table on your worksheet for your first product.

LESSON 7.3

Print-on-Demand

The Big Idea

Print-on-demand (POD) lets you sell custom-designed products (t-shirts, mugs, posters, tote bags, phone cases, stickers) without holding inventory. When a customer orders, a POD provider prints and ships the item. You create the designs and handle marketing; the provider handles production.

How POD Works

1. Create a design.
2. Upload it to a POD provider (examples include Printful, Printify, Gelato, and others).
3. Connect the provider to your store (Shopify, Etsy, WooCommerce, etc.), or use a marketplace that offers POD.
4. When an order comes in, it's automatically sent to the provider.
5. The provider prints and ships to your customer. You pay the provider's base cost; your profit is the difference between your price and their costs and fees.

Pros and Cons

Pros	Cons
No inventory or upfront stock	Lower margins than bulk production
Easy to test many designs	Less control over quality and shipping times
Wide product range	Very competitive market
Automated fulfillment	Customer service issues land on you

Keys to POD Success

- **Niche designs:** designs for specific identities, hobbies, professions, or communities tend to stand out more than generic designs.
- **Order samples** of every product to check quality, colors, and fit.
- **Realistic mockups** that accurately represent the product.
- **Clear sizing charts** and production/shipping time expectations.
- **Intellectual property caution:** never use trademarks, copyrighted characters, brand logos, song lyrics, celebrity names or likenesses, or sports team names without permission. Infringement can lead to takedowns, account suspensions, and legal claims. Check USPTO.gov's trademark database for phrases you want to use.

- **AI designs:** if you use AI-generated art, review it carefully for errors, similarity to existing works, and the platform's rules on AI content. Copyright protection for purely AI-generated works may be limited; see the U.S. Copyright Office's guidance.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical nurse creates a POD line of humorous-but-kind designs for night-shift nurses (original phrases she wrote, checked against the USPTO database). She orders samples of each shirt and mug, photographs herself wearing one, and lists five designs to test which resonate with her audience.

AI Prompt: POD Design Concepts

COPY-AND-PASTE AI PROMPT

I want to create print-on-demand designs for [NICHE AUDIENCE]. Generate 20 original design concepts (phrases and visual ideas) that reflect this community's humor, pride, or values. Avoid any trademarks, brand names, copyrighted characters, song lyrics, celebrity references, or existing well-known slogans. For each, suggest which product type it fits best. Remind me to search USPTO.gov for each phrase.

> **EXERCISE 7.3:** If POD fits your plan, create three original design concepts, search each phrase on USPTO.gov, and order one sample.

LESSON 7.4

E-commerce Fundamentals

The Big Idea

Running an online store means managing a set of connected systems: **storefront, products, payments, shipping, taxes, policies, and marketing.** Understanding these fundamentals helps you avoid costly mistakes.

Where to Sell: Your Store vs. Marketplaces

Option	Examples	Pros	Cons
Your own store	Shopify, WooCommerce, Squarespace, Wix	Control, branding, customer data	You must drive traffic
Marketplaces	Etsy, Amazon, eBay	Built-in shoppers	Fees, competition, platform rules, less control
Social commerce	Facebook/Instagram Shops, TikTok Shop	Sell where people scroll	Platform-dependent, changing rules

Many sellers start on a marketplace for built-in traffic and build their own store over time. Diversifying reduces dependence on a single platform.

Essential Store Pages and Policies

- Home, Shop/Collections, Product pages, About, Contact, FAQ.
- **Shipping policy:** costs, processing times, delivery estimates, regions.
- **Return/refund policy:** timeframes, conditions, who pays return shipping, how to request.
- **Privacy policy** and **Terms of service.**

Consumer Protection Basics

- The FTC's **Mail, Internet, or Telephone Order Merchandise Rule** generally requires sellers to ship within the time stated (or within 30 days if no time is stated), and to notify customers and offer options if there's a delay. See FTC.gov.
- Be truthful in advertising and product claims.
- Honor your stated policies.

Sales Tax Basics for Online Sellers

- Sales tax rules are set by states (and some localities).

- You may need to collect sales tax in your home state and in other states where you meet "economic nexus" thresholds.
- Many marketplaces collect and remit sales tax for sellers in many states (marketplace facilitator laws), but your own website sales are generally your responsibility.
- Digital products are taxable in some states and not others.
- Most e-commerce platforms offer tax calculation tools. Register with your state's department of revenue as required, and consider a tax professional's help.

Key E-commerce Metrics

- **Conversion rate:** orders ÷ visitors.
- **Average order value (AOV):** revenue ÷ number of orders.
- **Customer acquisition cost (CAC):** marketing spend ÷ new customers.
- **Gross margin:** (revenue – COGS) ÷ revenue.
- **Repeat purchase rate:** customers who buy again ÷ total customers.

AI Prompt: Store Policy Drafts

COPY-AND-PASTE AI PROMPT

```
Draft a clear, customer-friendly shipping policy and return/refund
policy for my online store selling [PRODUCTS] from [STATE] to
[REGIONS]. My processing time: [DAYS]. Shipping methods and costs:
[DETAILS]. Return window: [DAYS]. Conditions: [CONDITIONS]. Digital
products: [REFUND RULES]. Use plain language and headings. Add a note
that I should have the policies reviewed for legal compliance.
```

AI Prompt: Choose Where to Sell

COPY-AND-PASTE AI PROMPT

```
I plan to sell [PRODUCTS] to [AUDIENCE]. My budget: [AMOUNT].
My marketing strengths: [e.g., Instagram, SEO, none yet].
Compare selling on my own store vs. 2-3 relevant marketplaces vs.
social commerce, covering fees structure (tell me to verify current
fees), traffic, control, and effort. Recommend a starting approach
and a 6-month plan to diversify.
```

EXERCISE 7.4: Choose your sales channel(s), draft your shipping and return policies, and research your state's sales tax registration requirements.

LESSON 7.5

Product Research

The Big Idea

Product research reduces the risk of investing time and money in products nobody wants. The goal: find products with **real demand, manageable competition, healthy margins, and a reason customers would choose yours.**

Product Research Methods

1. **Marketplace research:** Search Etsy, Amazon, and eBay for your product idea. Note prices, review counts, ratings, and how many sellers offer similar items. Read 2–3 star reviews for unmet needs.
2. **Search trends:** Use Google Trends to see if interest is growing, stable, declining, or seasonal.
3. **Social signals:** Look at what's being discussed, saved, and shared in your niche (comments asking "where can I buy this?" are especially useful).
4. **Customer conversations:** Ask your audience what they want and what they've bought.
5. **Competitor stores:** Review best-seller sections and new-arrival patterns.

The Product Scorecard

Score each product idea 1–5:

Criterion	Question
Demand	Is there evidence people buy this?
Competition	Can I stand out? (5 = little direct competition or clear differentiation)
Margin	Can I earn a healthy margin after all costs?
Differentiation	Do I have a unique angle?
Simplicity	Is it easy to produce, ship, and support?
Fit	Does it fit my brand and audience?

Red Flags

- Fragile, heavy, or oversized items (shipping costs and breakage).
- Products with complex safety regulations unless you're prepared.
- Trend-only products that may fade quickly.
- Items that infringe on trademarks or patents.
- Markets dominated by a few sellers with thousands of reviews and very low prices.

EXAMPLE (HYPOTHETICAL): A hypothetical seller considers three ideas: phone cases (very crowded, low differentiation), handmade dog bandanas in sports-neutral seasonal patterns (moderate competition, she can sew, light to ship), and glass terrariums (fragile, costly to ship). Her scorecard favors dog bandanas. She reads reviews of top competitors and notices complaints about sizing, so she plans a clear size guide and adjustable snaps.

AI Prompt: Review Mining for Product Gaps

COPY-AND-PASTE AI PROMPT

```
Here are customer reviews of competing products (mostly 2-3 star):
[PASTE REVIEWS]
Identify: the top complaints, features customers wish existed,
quality issues, sizing/usability problems, and packaging/shipping
complaints. Suggest 5 specific improvements my product could offer.
Use only what's in the reviews.
```

AI Prompt: Product Scorecard

COPY-AND-PASTE AI PROMPT

```
Score these product ideas 1-5 on demand, competition, margin,
differentiation, simplicity, and fit, based on the research notes
I provide. Put results in a table with totals and explain the top
pick's biggest risk. If my notes don't support a score, say so
instead of guessing.
Ideas and notes: [PASTE]
```

EXERCISE 7.5: Score at least three product ideas using the scorecard on your worksheet and mine reviews for your top choice.

LESSON 7.6

Product Descriptions

The Big Idea

Online shoppers can't touch, try, or ask a salesperson. Your **product description and images** must answer their questions and help them imagine owning the product, honestly and clearly.

The Product Description Framework

1. **Title:** clear, descriptive, searchable (what it is + key attribute + who it's for).
2. **Opening line:** the main benefit or feeling.
3. **Benefit bullets (3–5):** how it improves their life.
4. **Details:** materials, dimensions, weight, care instructions, compatibility, file formats.
5. **What's included.**
6. **Shipping/delivery and returns** summary.
7. **Size guide or FAQ** if relevant.

Writing Tips

- Write for your target customer, using their language.
- Be specific: "Holds up to 15 lbs" beats "very strong."
- Use sensory words for physical products (soft, crisp, matte, warm).
- Scan-friendly formatting: short paragraphs, bullets, bold key details.
- Include keywords naturally for search (especially on marketplaces).
- No exaggeration or unprovable claims (e.g., health benefits) and no fake scarcity.

Product Photos Checklist

- Clean main image (often white or neutral background for marketplaces).
- Multiple angles and close-ups of details.
- Scale reference (in hand, in a room, on a model).
- Lifestyle image showing the product in use.
- For digital products: accurate previews of actual pages.
- Consistent lighting and style across your store.

EXAMPLE (HYPOTHETICAL): Title: "Weekly Meal Planner Notepad — 52 Tear-Off Sheets with Grocery List, 6 × 9 in." Opening: "Plan your week's meals in five minutes and never forget the milk again." Bullets: tear-off grocery list, magnetic back for the fridge, thick paper that resists ink bleed, room for seven days of meals and snacks. Details: dimensions, paper weight, materials. Shipping: ships in 2 business days.

AI Prompt: Product Description Writer

COPY-AND-PASTE AI PROMPT

```
Write a product description for [PRODUCT] for [AUDIENCE].
Facts: [MATERIALS, SIZE, FEATURES, WHAT'S INCLUDED, CARE].
Shipping/returns: [SUMMARY].
Provide: 3 title options (marketplace-friendly, under 140 characters),
an opening line, 5 benefit bullets, a details section, and an FAQ
with 4 questions. Brand voice: [VOICE]. Use only the facts provided;
no unprovable claims.
```

AI Prompt: Marketplace SEO Tags

COPY-AND-PASTE AI PROMPT

```
Suggest 13 search tags/keywords (each under 20 characters) for my
[MARKETPLACE] listing for [PRODUCT] aimed at [AUDIENCE]. Include
variations on product type, use case, recipient, style, and
occasion. Avoid trademarked terms and irrelevant keywords.
```

EXERCISE 7.6: Write a complete description for one product using the framework and plan its photo set with the checklist.

LESSON 7.7

Checkout Systems

The Big Idea

Checkout is where interest becomes revenue, and where many potential sales are lost. A good checkout is fast, trustworthy, mobile-friendly, and transparent about costs.

Checkout Options

- **Built-in store checkout** (Shopify, Squarespace, Wix, WooCommerce).
- **Payment links and buttons** (e.g., Stripe Payment Links, PayPal, Square) that you can add to any website, email, or message.
- **Digital product platforms** (e.g., Gumroad, Payhip, Lemon Squeezy, Podia) that handle checkout and delivery.
- **Invoicing** for services (send invoices with a "Pay now" link).

Payment Processing Basics

- Processors typically charge a percentage plus a fixed fee per transaction; check current rates on each provider's official pricing page.
- Offer common payment methods: cards and widely used digital wallets.
- Payouts go to your **business bank account** (Module 2).
- Never store card numbers yourself. Use reputable processors that handle security (PCI compliance).

Checkout Best Practices

- **Show total costs early** (shipping, taxes) to avoid surprises at the end.
- **Guest checkout** option (don't force account creation).
- **Few form fields.**
- **Mobile-optimized** design.
- **Trust signals:** secure checkout, clear return policy link, contact info.
- **Confirmation page and email** with order details and next steps.
- **Test** with a real low-cost purchase and refund before launch.

Abandoned Cart Recovery

Many platforms can automatically email customers who started but didn't finish checkout (only where permitted and in line with your privacy policy). A short, helpful reminder ("Still deciding? Here's your cart, and our return policy") can recover some sales without pressure.

EXAMPLE (HYPOTHETICAL): A hypothetical printable shop owner tests her checkout on a phone and finds the shipping field appears even though her products are digital. She updates the product settings to "digital product, no shipping required," which simplifies checkout to email and payment only.

AI Prompt: Checkout Audit

COPY-AND-PASTE AI PROMPT

Here's a step-by-step description of my checkout process (or screenshots described in text): [DESCRIBE]. I sell [PRODUCTS] to [AUDIENCE], mostly on [MOBILE/DESKTOP]. Identify friction points, missing trust signals, and surprise costs. Suggest improvements in priority order and write my order confirmation email.

AI Prompt: Abandoned Cart Emails

COPY-AND-PASTE AI PROMPT

Write 2 abandoned-cart reminder emails for [STORE] selling [PRODUCTS]. Email 1 (a few hours later): friendly reminder + answer a common question. Email 2 (next day): highlight the return policy and support contact. Each under 100 words, with subject lines. No fake scarcity, no pressure, no discount unless I specify one: [DISCOUNT or "none"].

EXERCISE 7.7: Set up checkout (or a payment link), complete a real test purchase and refund, and record the results on your worksheet.

LESSON 7.8

Fulfillment

The Big Idea

Fulfillment is everything that happens between an order and the customer receiving it: picking, packing, shipping, delivery confirmation, and handling returns. Smooth fulfillment builds trust; delays and errors destroy it.

Fulfillment Models

Model	How it works	Best for
Self-fulfillment	You pack and ship from home or a workspace	Starting out, handmade, low volume
Print-on-demand / dropship	Supplier fulfills automatically	No-inventory models
Third-party logistics (3PL)	A warehouse stores and ships your inventory	Higher volume
Marketplace fulfillment	Marketplace stores and ships (e.g., Fulfillment by Amazon)	Marketplace-focused sellers
Digital delivery	Automatic download link or access email	Digital products

Self-Fulfillment Setup

1. **Packing station:** boxes/mailers, protective materials, tape, scale, label printer (optional).
2. **Shipping software or platform shipping tools** to compare carriers and buy discounted labels.
3. **Packing checklist** for each order (item, quantity, condition, insert/thank-you card).
4. **Processing time** stated in your policy (e.g., ships in 1–3 business days) and honored.
5. **Tracking numbers** sent automatically.

Shipping Strategy Options

- **Free shipping** (built into product price).
- **Flat-rate shipping.**
- **Calculated shipping** (based on weight and location).
- **Free shipping above a threshold** (to encourage larger orders).

Whatever you choose, be transparent and make sure your margins still work.

Digital Delivery Checklist

- Automatic delivery email with download link.
- Link works on mobile and desktop.
- Clear instructions (how to download, open, or copy a template).
- Backup option if a link fails ("Reply to this email and we'll send it directly").

Handling Delays and Problems

Follow your stated timelines. If delays happen, notify customers proactively and offer options (as required by the FTC's Mail Order Rule when applicable). For lost or damaged packages, have a clear process: confirm details, file carrier claims if insured, and resolve fairly.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical candle business batches packing every Monday, Wednesday, and Friday. Each order follows a printed checklist, gets a handwritten thank-you card, and ships with tracking. When a supplier delay affects one scent, the owner emails affected customers the same day with the new ship date and an option to swap scents or cancel for a full refund.

AI Prompt: Fulfillment SOP

COPY-AND-PASTE AI PROMPT

```
Write a fulfillment standard operating procedure for my [PRODUCT
TYPE] business shipping about [NUMBER] orders per week from home.
Include: daily order check, picking and packing steps, quality
check, labeling and shipping, sending tracking, handling address
errors, delays (with customer notification), damaged/lost package
process, and returns processing. Format as a numbered checklist.
```

AI Prompt: Delay Notification Email

COPY-AND-PASTE AI PROMPT

```
Write a short, honest email notifying customers that their order of
[PRODUCT] is delayed. Original ship date: [DATE]. New estimated ship
date: [DATE]. Reason (brief): [REASON]. Options: wait, swap for
[ALTERNATIVE], or cancel for a full refund. Apologize sincerely and
make it easy to choose an option. Under 130 words.
```

> **EXERCISE 7.8:** Choose your fulfillment model, write your fulfillment SOP, and set your processing time and shipping strategy.

LESSON 7.9

Customer Support

The Big Idea

Customer support is where reputations are made. Buyers often don't remember perfect transactions, but they do remember how a business handled a problem. Clear policies, fast responses, and fair solutions turn issues into trust.

Support Essentials for Online Stores

- **Contact options:** email and/or chat; consider a contact form with an order-number field.
- **Response time commitment:** e.g., within 24 hours on business days.
- **FAQ and help pages:** shipping, returns, sizing, downloads, order changes.
- **Saved replies** for common issues.
- **Order lookup process:** know how to quickly find an order and its tracking.
- **Escalation rules:** when to refund, replace, or offer store credit, aligned with your policies.

The Most Common Support Requests

1. "Where is my order?" → share tracking and estimated delivery.
2. "I can't download my file." → resend link; give step-by-step instructions.
3. "It arrived damaged." → apologize, request a photo, replace or refund per policy.
4. "I want to return/exchange." → explain the process clearly.
5. "Can I change my order?" → act quickly if not yet shipped.
6. "Is this the right size/version for me?" → helpful pre-sale guidance.

Turning Support Into Improvement

Track the reason for every support request in a simple spreadsheet. Each month, find the top three reasons and fix the root cause (clearer size chart, better packaging, more visible download link). Fewer repeat issues means a better experience and less support work.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical POD shop notices several "Does this run small?" questions each week. The owner adds a measurement chart and a short note ("If you're between sizes, size up") to every shirt listing. Sizing questions and size-related returns drop noticeably in her own tracking.

AI Prompt: Support Reply Library

COPY-AND-PASTE AI PROMPT

Create a customer support reply library for my online store selling [PRODUCTS]. Policies: [SHIPPING, RETURNS, REFUNDS, DIGITAL DOWNLOADS]. Write templates (under 100 words each) for: where is my order, download problem, damaged item, return request, exchange request, order change request, pre-sale sizing/version question, and a complaint about slow shipping. Warm, clear, solution-focused, with [PLACEHOLDERS]. Never promise anything beyond my policies.

AI Prompt: Monthly Support Analysis

COPY-AND-PASTE AI PROMPT

Here is my support log for the month (reason + short note):
[PASTE]
Group requests by reason, count them, identify the top 3 root causes, and suggest one specific fix for each (website change, product page update, packaging change, policy clarification).

EXERCISE 7.9: Write your support FAQ and saved replies, set your response-time commitment, and create a support log spreadsheet.

MODULE 7

Module 7 Worksheet

Part A: Product Type Decision

Type	Interested?	Why / why not
Digital products		
Physical (handmade/wholesale)		
Print-on-demand		
Dropshipping		

Part B: Product Scorecard (score 1–5)

Product idea	Demand	Competition	Margin	Differentiation	Simplicity	Fit	Total

Part C: Unit Economics

Line	Amount
Selling price	$
Product cost (COGS)	$
Packaging	$

Line	Amount
Shipping I pay	$
Platform fee	$
Payment processing fee	$
Profit per unit	$
Gross margin %	%

Part D: Store Setup

Item	Decision / status
Sales channel(s)	
Shipping policy drafted	
Return/refund policy drafted	
Sales tax registration researched	
Checkout tested (purchase + refund)	
Fulfillment model	
Processing time	

Part E: Product Description Draft

Title: _____

Opening line: _____

Benefit bullets: _____

Details and what's included: _____

Part F: Support Setup

Response time commitment: _____ Support email: _____

Common request	Saved reply ready?
Where is my order?	
Download problem	
Damaged item	
Return / exchange	

MODULE 7

Action Checklist

- [ ] Choose your product type(s)
- [ ] Score at least three product ideas
- [ ] Mine competitor reviews for gaps
- [ ] Calculate unit economics (physical) or outline your product (digital)
- [ ] Order samples (physical or POD) and check quality
- [ ] Check any design phrases on USPTO.gov (POD)
- [ ] Choose sales channels and draft shipping and return policies
- [ ] Research sales tax registration for your state
- [ ] Write product descriptions and plan product photos
- [ ] Set up checkout and complete a test purchase and refund
- [ ] Write your fulfillment SOP
- [ ] Create a support FAQ, saved replies, and a support log

MODULE 7

Knowledge Check

1. Which is a key advantage of digital products?
A) No need for marketing
B) No inventory or shipping, and they can be sold many times
C) Guaranteed sales
D) No competition

2. What is print-on-demand?
A) Buying large inventory in advance
B) A provider prints and ships custom items when an order is placed
C) A type of digital download
D) A shipping carrier

3. Which design is safest for a POD product?
A) A famous cartoon character
B) A sports team logo
C) An original phrase you've checked against USPTO records
D) Song lyrics

4. What does the FTC's Mail Order Rule generally require?
A) Free shipping
B) Shipping within the stated time (or 30 days if none stated) and notifying customers of delays with options
C) Overnight delivery
D) No returns

5. How is average order value (AOV) calculated?
A) Visitors ÷ orders
B) Revenue ÷ number of orders
C) Profit ÷ visitors
D) Orders ÷ revenue

6. True or false: If you sell on your own website, a marketplace automatically handles your sales tax.

7. Which is a checkout best practice?
A) Hide shipping costs until the final step
B) Require account creation
C) Offer guest checkout and show total costs early
D) Add as many form fields as possible

8. What should you do with recurring support issues?

A) Ignore them

B) Track reasons and fix root causes monthly

C) Remove your contact page

D) Raise prices

MODULE 7

Answer Key

1. **B.** No inventory or shipping, and one product can be sold repeatedly.
2. **B.** A provider produces and ships each item after it's ordered.
3. **C.** Original phrases, checked for trademark conflicts, reduce infringement risk.
4. **B.** Ship as promised (or within 30 days if no time was stated) and notify customers of delays with options.
5. **B.** AOV equals revenue divided by number of orders.
6. **False.** Sales tax on your own website's sales is generally your responsibility.
7. **C.** Transparent costs and guest checkout reduce friction.
8. **B.** Tracking and fixing root causes improves experience and reduces workload.

MODULE

08

AUTOMATE AND SCALE

8.1 AI-Powered Workflows

8.2 Business Process Automation

8.3 Email Marketing

8.4 Customer Retention

8.5 Building Systems

8.6 Hiring Contractors

8.7 Tracking Revenue and Expenses

8.8 Measuring Business Performance

MODULE 8: AUTOMATE AND SCALE

MODULE OVERVIEW: Once your business has customers and repeatable activities, the next challenge is doing more without burning out. This module shows you how to build AI-powered workflows, automate routine processes, use email marketing, keep customers coming back, document systems, hire contractors responsibly, track revenue and expenses, and measure performance so your decisions are based on data. Scaling isn't about doing everything faster; it's about building a business that runs on systems rather than on your memory and willpower.

In this module:

- Lesson 8.1: AI-Powered Workflows
- Lesson 8.2: Business Process Automation
- Lesson 8.3: Email Marketing
- Lesson 8.4: Customer Retention
- Lesson 8.5: Building Systems
- Lesson 8.6: Hiring Contractors
- Lesson 8.7: Tracking Revenue and Expenses
- Lesson 8.8: Measuring Business Performance

> **NOTE:** Contractor classification, payroll, and tax topics in this module are general education only, not legal or tax advice. Rules vary by state. Check IRS.gov, DOL.gov, and your state labor department, and consult a professional for your situation.

LESSON 8.1

AI-Powered Workflows

The Big Idea

In Module 3 you learned to use AI as an assistant. Now you'll **embed AI into recurring workflows** so that it supports your business every week. The goal is consistent output with less effort, while you stay in control of quality and decisions.

The Workflow Stack

1. **Inputs:** where information comes from (forms, emails, notes, sales data).
2. **AI processing:** summarize, draft, classify, or analyze using saved prompts or custom assistants.
3. **Human review:** approve, edit, or reject.
4. **Outputs:** send, publish, file, or update a record.
5. **Feedback loop:** improve prompts based on what you had to fix.

High-Value AI Workflows for Small Businesses

Workflow	Input	AI step	Output
Weekly content	Idea list, customer questions	Draft posts in brand voice	Scheduled posts
Inquiry replies	New inquiry	Draft reply from FAQ and pricing	Reviewed, sent email
Meeting notes	Call notes or transcript (with consent)	Summarize + action items	Client recap email + task list
Proposals	Discovery notes	Draft proposal from template	Reviewed proposal
Review responses	New reviews	Draft responses	Posted replies
Monthly report	Sales and marketing numbers	Summarize trends and suggest actions	Owner dashboard notes

Build a "Prompt Library"

Create a document (or spreadsheet) where you store every prompt that works well, with:

- Name and purpose
- The prompt text
- Required inputs
- Example output

- Last updated date and notes

This becomes a business asset. A future contractor can use it, too.

Guardrails for AI Workflows

- Keep a human review step for anything customer-facing.
- Don't feed sensitive personal data into tools without understanding their data handling.
- If you record calls for AI notes, get consent (some states require all parties to consent to recording).
- Spot-check AI outputs regularly, even when they've been reliable.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical virtual assistant agency creates a "client recap" workflow. After each client call, she pastes her notes into a saved prompt that produces a summary, decisions, action items with owners, and a draft recap email. She reviews, edits, and sends within an hour of each call, which clients appreciate.

AI Prompt: Build a Prompt Library Entry

COPY-AND-PASTE AI PROMPT

```
Turn this prompt that worked well for me into a reusable prompt
library entry. Include: a name, purpose, when to use it, required
inputs (as [PLACEHOLDERS]), the improved prompt text, a quality
checklist for reviewing the output, and common fixes.
My prompt: [PASTE]
```

AI Prompt: Meeting Notes to Action Items

COPY-AND-PASTE AI PROMPT

```
Here are my notes from a call with [CLIENT/PROSPECT] about [TOPIC]:
[PASTE NOTES]
Produce: (1) a 5-bullet summary, (2) decisions made, (3) action items
with owner and due date, (4) open questions, and (5) a short,
friendly recap email to send them. Don't add anything not in the notes.
```

> **EXERCISE 8.1:** Identify three workflows to enhance with AI. Create prompt library entries for each and test them for one week.

LESSON 8.2

Business Process Automation

The Big Idea

Business process automation uses software to perform tasks automatically when certain events happen. No-code tools (e.g., Zapier, Make, and built-in automations in many apps) connect your apps so information moves without manual copying.

The Trigger-Action Model

Every automation follows a simple pattern:

- **Trigger:** something happens ("a new form is submitted").
- **Action(s):** something is done automatically ("add a row to a spreadsheet," "send an email," "create a task").
- **Filters/conditions (optional):** only run when certain criteria are met.

Starter Automations

1. **New lead → CRM/spreadsheet + notification:** every form submission is logged and you get an alert.
2. **New booking → confirmation + reminder:** scheduling tools send confirmations and reminders automatically.
3. **New purchase → welcome email + onboarding:** customers receive next steps immediately.
4. **Invoice overdue → reminder email.**
5. **New email subscriber → welcome sequence** (Lesson 8.3).
6. **New review → notification** so you respond quickly.
7. **Weekly → summary report** of new leads and sales.

Automation Safety Checklist

- Test with your own data before going live.
- Name automations clearly and document them in a simple list (what, trigger, apps, owner).
- Set error notifications so you know when something breaks.
- Review monthly; apps change and automations can fail silently.
- Avoid automations that could send wrong or duplicate messages to customers without review.
- Know which accounts hold customer data and secure them with strong passwords and two-factor authentication.

EXAMPLE (HYPOTHETICAL): A hypothetical tutoring business automates: new booking form → student added to a spreadsheet → confirmation email with session details → calendar event created → reminder email 24 hours before the session. The owner receives a daily summary instead of handling each step manually.

AI Prompt: Automation Blueprint

COPY-AND-PASTE AI PROMPT

I want to automate this process: [DESCRIBE STEPS I DO MANUALLY]. Apps I use: [LIST]. Create an automation blueprint with: trigger, filters, each action step, data fields mapped between apps, error handling, and a testing plan. Explain it for a beginner using a no-code tool. Flag any step that should keep human review.

AI Prompt: Automation Inventory

COPY-AND-PASTE AI PROMPT

Here's a list of automations I've set up: [LIST]. Create an automation inventory table with columns: name, purpose, trigger, apps involved, data touched (flag personal data), owner, how to test, and last checked date. Suggest which ones are most risky if they fail and how to monitor them.

EXERCISE 8.2: Build one starter automation, test it with your own information, and add it to your automation inventory on the worksheet.

LESSON 8.3

Email Marketing

The Big Idea

Your **email list** is one of the few marketing channels you own. Social media platforms control who sees your posts; with email, you can reach people who chose to hear from you. Email marketing supports nurturing leads, launching offers, and keeping customers engaged.

Building Your List (Ethically)

- Only add people who **opted in** (lead magnet, newsletter signup, checkout with consent).
- Never buy email lists.
- Be clear about what subscribers will receive and how often.
- Follow the **CAN-SPAM Act:** accurate header information, non-deceptive subject lines, identify ads where required, include your physical postal address, provide a clear opt-out, and honor opt-outs promptly (within 10 business days). See FTC.gov.
- If you have subscribers outside the U.S., other laws (like Canada's CASL or the EU's GDPR) may apply.

Essential Email Types

1. **Welcome sequence:** automated series for new subscribers (Module 6).
2. **Newsletter:** regular helpful content (weekly, biweekly, or monthly).
3. **Promotional emails:** launches, new products, real limited-time offers.
4. **Transactional emails:** receipts, confirmations, shipping updates.
5. **Re-engagement:** to inactive subscribers.
6. **Post-purchase:** onboarding, tips, review requests, cross-sells.

A Simple Newsletter Format

- **Subject line:** clear and interesting, not misleading.
- **Opening:** one personal or relevant line.
- **Main value:** one tip, story, or insight.
- **Optional quick links:** new post, product, event.
- **Call to action:** one primary action.
- **Sign-off.**

Key Email Metrics

- **Open rate:** an imperfect metric, because some email apps' privacy features can affect how opens are recorded. Use it as a rough signal only.

- **Click rate:** clicks ÷ emails delivered. Often more meaningful.
- **Conversion:** purchases or bookings from email.
- **Unsubscribe rate:** watch for spikes after certain emails.
- **List growth:** new subscribers minus unsubscribes.

Segmentation

Group subscribers by interest, behavior, or customer status (e.g., leads vs. customers) and send more relevant emails. Even two segments, "prospects" and "customers," can improve relevance.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical plant shop sends a biweekly newsletter with one seasonal plant care tip, one photo of a new arrival, and a link to the shop. Customers who bought a specific plant receive an automated care-tip email two weeks after delivery.

AI Prompt: Newsletter Generator

COPY-AND-PASTE AI PROMPT

```
Write a newsletter for [BUSINESS] subscribers ([AUDIENCE]).
Main topic: [TOPIC]. One helpful tip or insight, a short personal
opening, one quick link to [LINK DESCRIPTION], and one call to
action: [CTA]. Under 300 words. Give 5 subject line options and
preview text. Honest and non-clickbait.
```

AI Prompt: Launch Email Sequence

COPY-AND-PASTE AI PROMPT

```
Write a 4-email launch sequence for [NEW OFFER] at [PRICE] for my
email list of [AUDIENCE]. Real launch details: [DATES, LIMITS IF
ANY]. Emails: (1) announcement, (2) how it helps + what's included,
(3) FAQ and objections, (4) reminder (mention a deadline only if
real). Each under 250 words with 2 subject line options.
No fake scarcity, no income or results guarantees.
```

AI Prompt: Re-Engagement Email

COPY-AND-PASTE AI PROMPT

```
Write a re-engagement email for subscribers who haven't opened or
clicked in [TIMEFRAME]. Remind them what they signed up for, share
one genuinely useful thing, and give them an easy choice: stay
subscribed or unsubscribe. Friendly, no guilt. Under 150 words.
```

EXERCISE 8.3: Choose an email marketing tool, set up your signup form and welcome sequence, and schedule your first newsletter.

LESSON 8.4

Customer Retention

The Big Idea

Customer retention is keeping customers coming back. Many businesses find that serving existing satisfied customers is less costly than constantly finding new ones, and returning customers often provide referrals and reviews. Retention starts with a great first experience (Module 6) and continues with ongoing value.

Retention Strategies

1. **Excellent delivery:** the foundation of everything.
2. **Onboarding:** help customers get value quickly from what they bought.
3. **Check-ins:** follow up after delivery to ensure satisfaction.
4. **Recurring offers:** subscriptions, maintenance plans, retainers, refills.
5. **Personalization:** remember preferences and history.
6. **Loyalty perks:** thank-you discounts, early access, or bonuses for returning customers (keep them simple and honest).
7. **Helpful content:** newsletters and tips that keep you top of mind.
8. **Win-back campaigns:** reconnect with past customers.
9. **Feedback loops:** ask, listen, improve, and tell customers what you changed.

Retention Metrics

- **Repeat purchase rate:** customers with 2+ purchases ÷ total customers.
- **Churn rate (subscriptions/retainers):** customers who cancel in a period ÷ customers at the start of the period.
- **Customer lifetime value (CLV), simplified:** average order value × average number of purchases per customer over a period. (A rough estimate; use your own data.)

Hypothetical practice example: If average order value is $50 and customers buy an average of 3 times over two years, the simplified CLV over two years is $150.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical lawn-care business sends every customer a "season plan" email in early spring offering a maintenance plan with a fixed monthly price, and a fall reminder about leaf cleanup. Customers who choose the plan get priority scheduling, a perk that costs little to provide but is valuable to them.

AI Prompt: Retention Plan

COPY-AND-PASTE AI PROMPT

My business: [DESCRIPTION]. Customers typically buy [WHAT] [HOW OFTEN]. Create a customer retention plan with: an onboarding sequence, a check-in schedule, 3 recurring offer ideas, a simple loyalty perk, a win-back email for customers who haven't bought in [TIMEFRAME], and the metrics I should track monthly.

AI Prompt: Win-Back Message

COPY-AND-PASTE AI PROMPT

Write a short, personal win-back message (email and text versions) for past customers of [BUSINESS] who last purchased [TIMEFRAME] ago. Mention what's new: [UPDATES]. Offer: [REAL OFFER or "none"]. Under 100 words each. Easy to ignore or opt out; no guilt or pressure. (I'll only text customers who've given consent.)

EXERCISE 8.4: Calculate your repeat purchase rate (or estimate it), and implement one retention strategy this month.

LESSON 8.5

Building Systems

The Big Idea

A **system** is a documented, repeatable way of getting something done. Systems let you deliver consistent quality, take time off, delegate work, and grow. Without systems, the business lives in your head, and you become the bottleneck.

The Core Systems Every Small Business Needs

1. **Marketing system:** how you create and publish content and generate leads.
2. **Sales system:** how you handle inquiries, consultations, proposals, and follow-ups.
3. **Delivery system:** how you fulfill products or services.
4. **Customer support system:** how you handle questions and issues.
5. **Finance system:** invoicing, bookkeeping, tax savings, reporting.
6. **Admin system:** files, passwords, tools, calendar.

How to Document a System (SOP)

1. **Do the task** and record your screen or take notes as you go.
2. **Write the steps** in order, with screenshots or short videos if helpful.
3. **Add checklists** for quality.
4. **Note the tools and logins** needed (store credentials in a password manager, never in the SOP itself).
5. **Test it:** have someone else follow it, or follow it yourself "as a beginner" in a week.
6. **Update it** whenever the process changes.

Your Business Operations Hub

Keep all SOPs, templates, prompts, policies, and automation inventories in one organized place (a shared drive folder, Notion workspace, or similar):

- 01-Marketing
- 02-Sales
- 03-Delivery
- 04-Support
- 05-Finance
- 06-Admin
- 07-Prompt-Library

The Owner's Weekly and Monthly Rhythm

- **Weekly:** review leads, sales, cash, content, and support log (60 minutes).
- **Monthly:** review metrics, update SOPs, check automations, reconcile books, plan next month's priorities.
- **Quarterly:** review goals, pricing, offers, and tools; decide what to start, stop, and continue.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical photographer documents her "wedding delivery system": backup files the same night, cull within 3 days, edit using saved presets, deliver a sneak peek in 7 days, full gallery in 30 days, send a thank-you and review request. Because it's written down, she can later hire an editing contractor and give them a clear process.

AI Prompt: SOP From a Screen Recording Transcript

COPY-AND-PASTE AI PROMPT

```
Here's a transcript (or my rough notes) of me doing [TASK]:
[PASTE]
Turn it into an SOP with: purpose, when to do it, tools needed
(no passwords), numbered steps, screenshots to capture [MARK
WHERE], a quality checklist, common mistakes, and a definition of
done. Write it so a new contractor could follow it.
```

AI Prompt: Systems Gap Analysis

COPY-AND-PASTE AI PROMPT

```
Here's how I currently handle marketing, sales, delivery, support,
finance, and admin in my business: [DESCRIBE EACH].
For each area, rate how systemized it is (1-5), identify the biggest
risk if I were unavailable for two weeks, and recommend the first
SOP to write. Give me a 4-week plan to document my top systems.
```

> **EXERCISE 8.5:** Set up your Operations Hub folders and write SOPs for your two most frequent tasks.

LESSON 8.6

Hiring Contractors

The Big Idea

At some point, your time becomes the limit. Hiring **independent contractors** (freelancers) is a common first step to getting help without becoming an employer. But hiring well, and classifying workers correctly, matters.

What to Delegate First

Delegate tasks that are:

- **Repetitive and documented** (you have an SOP).
- **Outside your strengths** (design, bookkeeping, video editing).
- **Lower-value uses of your time** compared to sales and strategy.

Use a simple exercise: list your weekly tasks, estimate hours, and mark each as "only I can do," "someone else could do with an SOP," or "stop doing."

Contractor vs. Employee

Worker classification is a legal question, not just a preference. The IRS looks at the overall relationship, often grouped into three categories:

- **Behavioral control:** does the business control how the work is done?
- **Financial control:** does the business control the business aspects of the job (payment method, expenses, tools)?
- **Relationship:** are there written contracts, benefits, permanency, and is the work a key aspect of the business?

The U.S. Department of Labor and many states use their own tests (some states use a stricter "ABC test"). Misclassifying employees as contractors can lead to back taxes and penalties. See IRS.gov ("Independent contractor (self-employed) or employee?") and DOL.gov, and consult a professional when unsure.

Paperwork Basics (U.S. Contractors)

- Collect **Form W-9** from U.S. contractors before paying them.
- Issue **Form 1099-NEC** if payments for services meet the IRS reporting threshold for the year (the threshold has changed for recent years; check IRS.gov for the current amount and filing deadlines).
- Use a **written contractor agreement** covering scope, deliverables, deadlines, payment terms, confidentiality, ownership of work (intellectual property assignment), and termination.
- Payments through some third-party platforms may be reported differently; check current IRS guidance.

The Hiring Process

1. **Define the role:** tasks, outcomes, hours or deliverables, budget, timeline.
2. **Write a clear job post** with requirements and how to apply.
3. **Source candidates:** freelance marketplaces, referrals, professional communities.
4. **Screen:** review portfolios and relevant experience.
5. **Paid test project:** a small, real, paid task to evaluate quality and communication.
6. **Agreement:** sign a contractor agreement before work starts.
7. **Onboard:** share SOPs, tools access (limited to what's needed), expectations, and communication norms.
8. **Review:** check work closely at first; give clear feedback.

Protect Your Business

- Give access only to what's needed; use shared/delegated access instead of sharing your passwords.
- Use a password manager with sharing features.
- Remove access promptly when a contract ends.
- Keep ownership of your accounts, domain, and files.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical Etsy shop owner spends hours each week creating product mockups. She documents her process in an SOP, posts a project on a freelance marketplace, pays three finalists for a small test (five mockups each), chooses the best, signs an agreement that assigns ownership of the work to her shop, and shares a folder with only the files needed.

AI Prompt: Write a Contractor Job Post

COPY-AND-PASTE AI PROMPT

```
Write a job post for a freelance [ROLE] for my [BUSINESS].
Tasks: [LIST]. Hours or deliverables per week/month: [DETAILS].
Skills required: [SKILLS]. Tools: [TOOLS]. Budget: [RANGE].
Include: a short business intro, responsibilities, requirements,
a paid test project description, and application instructions that
ask a specific question to filter out generic applicants.
```

AI Prompt: Delegation Audit

COPY-AND-PASTE AI PROMPT

Here's a list of my weekly tasks with hours spent: [LIST].
Classify each as: "only I can do," "delegate with an SOP," "automate," or "stop doing." Estimate hours I could free up and suggest which role to hire first. Note any tasks where worker classification might be a concern so I can check with a professional.

LEGAL NOTICE: Not legal or tax advice. Worker classification rules vary by federal agency and state, and the consequences of misclassification can be significant. Consult a professional.

EXERCISE 8.6: Complete the Delegation Audit on your worksheet and draft a job post for your first contractor role (even if you'll hire later).

LESSON 8.7

Tracking Revenue and Expenses

The Big Idea

In Module 2 you set up bookkeeping. Now you'll use your financial data to **make decisions.** Revenue is not profit, and profit is not cash. Understanding all three keeps your business healthy.

The Three Core Financial Reports

1. **Profit and Loss (P&L) / Income Statement:** revenue minus expenses over a period = net profit. Answers "Am I making money?"
2. **Balance Sheet:** what the business owns (assets), owes (liabilities), and the owner's equity at a point in time.
3. **Cash Flow:** money actually coming in and going out. Answers "Will I have enough cash to pay bills?"

Revenue vs. Profit vs. Cash

- **Revenue:** total sales.
- **Profit:** revenue minus expenses.
- **Cash:** what's in the bank. You can be profitable on paper but short on cash if customers pay late or inventory ties up money.

Monthly Financial Review (30 minutes)

1. Reconcile accounts and categorize all transactions.
2. Review the P&L: revenue, top expenses, net profit.
3. Compare to last month and the same month last year (when you have the data).
4. Check outstanding invoices (accounts receivable).
5. Check upcoming bills and tax payments.
6. Transfer tax savings and owner's draw.
7. Review subscriptions; cancel what you don't use.
8. Write one financial decision for next month.

Revenue by Source

Track where revenue comes from: product lines, services, channels (website, marketplace, referrals). This shows what to invest in.

Simple Cash Flow Forecast

List expected cash in and cash out for the next 4–12 weeks. It helps you spot shortfalls before they happen (e.g., a big inventory order the same month as a quarterly estimated tax payment).

> **EXAMPLE (HYPOTHETICAL):** A hypothetical gift-basket business reviews its P&L and finds revenue increased in December, but profit didn't, because rush shipping costs ate into margins. For next year, it sets an earlier order cutoff and builds shipping costs into holiday pricing.

AI Prompt: Explain My P&L

COPY-AND-PASTE AI PROMPT

```
Here is my monthly profit and loss summary: [PASTE CATEGORIES AND AMOUNTS]. Explain in plain language: how the business performed, the biggest expense categories as a % of revenue, anything unusual compared to last month [PASTE LAST MONTH], and 3 questions I should investigate. Don't give tax advice; suggest questions for my tax professional if relevant.
```

AI Prompt: Cash Flow Forecast

COPY-AND-PASTE AI PROMPT

```
Build a 12-week cash flow forecast table for my business. Starting cash: [AMOUNT]. Expected weekly income: [DETAILS/ASSUMPTIONS]. Recurring expenses: [LIST WITH DATES]. One-time expenses: [LIST]. Tax payments: [DATES/AMOUNTS]. Owner's draw: [AMOUNT/SCHEDULE]. Show weekly ending cash and flag any week that drops below [MINIMUM CUSHION]. Give me the spreadsheet formulas.
```

> **EXERCISE 8.7:** Complete your first monthly financial review using the worksheet checklist and create a 12-week cash flow forecast.

LESSON 8.8

Measuring Business Performance

The Big Idea

You can't improve what you don't measure. But measuring everything leads to confusion. Choose a small set of **Key Performance Indicators (KPIs)** that tell you whether your business is healthy and growing.

Choose Your KPIs by Area

Area	Example KPIs
Marketing	Website visitors, new leads, email subscribers, top traffic sources
Sales	Consultations booked, close rate, conversion rate, average order value
Customers	Repeat purchase rate, churn, reviews, feedback score
Operations	Delivery time, support requests, on-time rate
Finance	Revenue, gross margin, net profit, cash on hand, customer acquisition cost

Pick **5–7 KPIs** that match your current stage. A brand-new business might track: leads, conversations, sales, revenue, expenses, and cash. A more established one might add CAC, CLV, and churn.

Leading vs. Lagging Indicators

- **Lagging indicators** show results that already happened (revenue, profit).
- **Leading indicators** predict future results (outreach messages sent, consultations booked, content published, email list growth).

Focus your weekly actions on leading indicators you control. Revenue is the outcome of many activities.

The One-Page Dashboard

Create a simple spreadsheet with one row per week and columns for your KPIs. Add a "notes" column for what happened (launches, holidays, changes). Review weekly. Look for trends over weeks and months, not single data points.

Making Decisions With Data

1. **Spot the trend** ("Leads dropped three weeks in a row").
2. **Ask why** (fewer posts? seasonal? broken form?).
3. **Decide one action.**
4. **Measure the result** in the following weeks.

EXAMPLE (HYPOTHETICAL): A hypothetical bookkeeping freelancer tracks: outreach messages sent, consultation calls, new clients, monthly recurring revenue, and hours worked. She notices her consultations rise in the weeks she sends more outreach messages, so she schedules outreach as a fixed weekly block rather than doing it "when she has time."

AI Prompt: Choose My KPIs

COPY-AND-PASTE AI PROMPT

```
My business: [DESCRIPTION]. Stage: [e.g., pre-launch, first 3
months, 1 year in]. Main goal for the next 90 days: [GOAL].
Recommend 5-7 KPIs (mix of leading and lagging), explain why each
matters, how to measure it with free tools, and a target-setting
approach based on my own baseline (no industry averages).
Design a weekly dashboard layout for a spreadsheet.
```

AI Prompt: Monthly Performance Review

COPY-AND-PASTE AI PROMPT

```
Here's my KPI dashboard for the last [X] weeks: [PASTE TABLE].
Identify trends, the strongest and weakest areas, possible causes
(as hypotheses), and recommend 3 priorities for next month.
Be honest about where the data is too limited to conclude anything.
```

EXERCISE 8.8: Choose your 5–7 KPIs, build your one-page dashboard, and record your first week of data.

MODULE 8

Module 8 Worksheet

Part A: AI Workflow Plan

Workflow	Input	AI step (prompt name)	Human review	Output

Part B: Automation Inventory

Automation name	Trigger	Actions	Apps	Personal data?	Last tested

Part C: Email Marketing Setup

Item	Decision / status
Email tool	
Signup form location(s)	
Welcome sequence (number of emails)	
Newsletter frequency	

Item	Decision / status
Physical mailing address in footer	
Segments	

Part D: Retention

Repeat purchase rate (or estimate): _____%

Retention strategy I'll implement this month: _____

Part E: Operations Hub and SOPs

SOP	Area	Written?	Tested?

Part F: Delegation Audit

Task	Hours/week	Only me / Delegate / Automate / Stop

First role to hire: _____

Part G: Monthly Financial Review

- [ ] Accounts reconciled and transactions categorized
- [ ] P&L reviewed and compared to last month
- [ ] Outstanding invoices checked
- [ ] Upcoming bills and tax payments checked
- [ ] Tax savings and owner's draw transferred
- [ ] Subscriptions reviewed

One financial decision for next month: _____

Part H: KPI Dashboard

Week	KPI 1:	KPI 2:	KPI 3:	KPI 4:	KPI 5:	Notes

MODULE 8

Action Checklist

- [ ] Create a prompt library with at least five entries
- [ ] Build and test one no-code automation
- [ ] Start an automation inventory
- [ ] Set up an email tool, signup form, and welcome sequence
- [ ] Schedule your first newsletter
- [ ] Implement one customer retention strategy
- [ ] Create your Operations Hub folder structure
- [ ] Write SOPs for your two most frequent tasks
- [ ] Complete a delegation audit and draft a contractor job post
- [ ] Complete your first monthly financial review
- [ ] Build a 12-week cash flow forecast
- [ ] Choose 5–7 KPIs and start a weekly dashboard

MODULE 8

Knowledge Check

1. What are the two basic parts of every automation?
A) Input and password
B) Trigger and action
C) Email and phone
D) Start and stop

2. Which is required under CAN-SPAM for marketing emails?
A) Emailing daily
B) A clear opt-out and a valid physical postal address
C) Using purchased lists
D) Including discounts

3. Why is open rate considered an imperfect email metric?
A) It's always zero
B) Privacy features in some email apps can affect how opens are recorded
C) It's illegal to track
D) It measures purchases

4. What is a leading indicator?
A) Last year's revenue
B) An activity metric that predicts future results, like consultations booked
C) Total profit
D) Taxes paid

5. Which factors does the IRS consider for worker classification?
A) Age, location, and experience
B) Behavioral control, financial control, and the type of relationship
C) Hourly rate only
D) Whether the person likes the job

6. True or false: A profitable business can still run out of cash.

7. What should you collect from a U.S. contractor before paying them?
A) Form W-9
B) Form W-2
C) Their bank password
D) Nothing

8. What's the best first step before delegating a task?

A) Hire immediately

B) Document it in an SOP

C) Share all your passwords

D) Stop tracking it

MODULE 8

Answer Key

1. **B.** A trigger starts the automation; actions are what it does.
2. **B.** CAN-SPAM requires an opt-out mechanism and a valid physical postal address, among other rules.
3. **B.** Privacy features can affect open tracking, so treat open rates as a rough signal.
4. **B.** Leading indicators are activities that predict future outcomes.
5. **B.** The IRS considers behavioral control, financial control, and relationship factors.
6. **True.** Profit on paper doesn't guarantee cash in the bank, which is why cash flow forecasting matters.
7. **A.** Form W-9 provides the contractor's taxpayer information for reporting.
8. **B.** A documented process makes delegation clear and consistent.

MODULE

09

YOUR FIRST 30 DAYS

9.1 A Practical 30-Day Launch Plan

9.2 Daily Business Tasks

9.3 Marketing Calendar

9.4 Website Launch Checklist

9.5 Customer Acquisition Checklist

9.6 Performance Tracking

9.7 Next Steps

MODULE 9: YOUR FIRST 30 DAYS

MODULE OVERVIEW: This is where everything comes together. You've learned how to choose a direction, set up your foundation, use AI, build a website, market, sell, run a store, and build systems. Now you'll follow a practical 30-day launch plan with daily tasks, a marketing calendar, a website launch checklist, a customer acquisition checklist, and a performance tracker. The plan is designed for someone with roughly 1–2 hours per weekday and a bit more on weekends. Adjust it to your schedule; consistency matters more than speed.

In this module:

- Lesson 9.1: A Practical 30-Day Launch Plan
- Lesson 9.2: Daily Business Tasks
- Lesson 9.3: Marketing Calendar
- Lesson 9.4: Website Launch Checklist
- Lesson 9.5: Customer Acquisition Checklist
- Lesson 9.6: Performance Tracking
- Lesson 9.7: Next Steps

> **NOTE:** This plan gives you a structure for action, not a promise of results. Some people will land a first customer within 30 days; others will need longer. What matters is that by Day 30 you have a real offer, a real presence, real conversations, and real data to guide your next 30 days.

LESSON 9.1

A Practical 30-Day Launch Plan

The Big Idea

A launch plan turns everything you've learned into a sequence. Each week has a theme and a clear outcome. If you fall behind, don't restart; just pick up where you are and keep moving.

The Four Phases

- **Week 1 (Days 1–7): Decide and validate.** Lock your direction, niche, and offer; collect evidence of demand.
- **Week 2 (Days 8–14): Build the foundation.** Business setup basics, brand, and website draft.
- **Week 3 (Days 15–21): Launch and reach out.** Publish your website, start content, begin direct outreach.
- **Week 4 (Days 22–30): Sell, follow up, and review.** Conversations, offers, follow-ups, and your first performance review.

The Day-by-Day Plan

Day	Focus	Key task	Module reference
1	Direction	Write your one-sentence direction and 90-day review date	1
2	Niche	Finalize your niche statement and list where your audience gathers	1
3	Problems	Collect 15+ customer quotes; identify 3 problem themes	1
4	Interviews	Hold or schedule 3 problem interviews	1
5	Demand	Complete a demand check: search, competitors, marketplaces	1
6	Offer	Draft your core offer with all seven parts	6
7	Pricing + review	Set launch price; weekly review	6
8	Name	Choose your business name; run availability checks	2
9	Legal basics	Decide structure; research licenses/permits; EIN if needed	2
10	Money	Open business bank account (or start the process); set up bookkeeping	2
11	Domain + email	Register domain; set up business email	2
12	Brand	Write brand style guide; create simple logo and colors	5

Day	Focus	Key task	Module reference
13	AI setup	Write Business Brief; build your first AI assistant	3
14	Website draft + review	Plan sitemap; draft homepage with AI; weekly review	4
15	Website pages	Build services/product page, about, contact	4
16	Lead capture	Create lead magnet and opt-in; connect email tool	4, 8
17	SEO + policies	On-page SEO, privacy policy, other policies	4
18	Launch website	Complete launch checklist and publish	4, 9
19	Social setup	Optimize your primary platform profile; Google Business Profile if eligible	5
20	Content batch	Create and schedule 2 weeks of content	5
21	Announce + review	Announce launch to your network; weekly review	4, 5
22	Outreach	Build a list of 25 leads/partners; send 5 personalized messages	5
23	Communities	Post helpful contributions in 2–3 communities (follow rules)	5
24	Sales assets	Finalize sales page, email templates, and consultation script	6
25	Outreach	Send 5 more messages; follow up on earlier ones	5, 6
26	Conversations	Hold consultations or respond to inquiries; send proposals	6
27	Follow-up	Follow up on all open leads and proposals	6
28	Automations	Set up one automation and your weekly dashboard	8
29	Customer experience	Create onboarding message, feedback form, review request	6
30	Review + plan	30-day performance review; plan the next 30 days	9

If You're Selling Products Instead of Services

Swap in these tasks:

- **Day 6:** choose your first 1–3 products and score them (Module 7).
- **Day 7:** calculate unit economics or outline your digital product.
- **Days 15–16:** create product pages and complete your first product (or order samples).
- **Day 17:** add shipping/return policies and test checkout.

- **Day 26:** run a launch promotion to your list and network.

AI Prompt: Personalize My 30-Day Plan

COPY-AND-PASTE AI PROMPT

```
Here's my situation:
- Business direction: [DIRECTION]
- Offer: [OFFER] (services or products?)
- Hours available: [WEEKDAYS] and [WEEKENDS]
- What I've already done: [LIST]
- Biggest constraint: [e.g., time, budget, confidence]
Adapt this 30-day launch plan to my situation: [PASTE OR SUMMARIZE
THE PLAN]. Keep the four phases. Remove tasks I've completed, adjust
for my hours, and give me a realistic day-by-day table with
estimated time per task. Mark the 5 tasks that matter most.
```

EXERCISE 9.1: Write your start date and the calendar date for each of the 30 days in your worksheet. Block the time on your calendar now.

LESSON 9.2

Daily Business Tasks

The Big Idea

Big results come from small, consistent actions. A **daily operating routine** keeps the most important activities happening even when motivation is low. During your first 30 days, aim for a short routine you can actually sustain.

The Daily Power Hour (60 Minutes)

1. **Plan (5 minutes):** review today's task from the 30-day plan; choose your top 3 priorities.
2. **Build (25 minutes):** work on today's main task.
3. **Reach (20 minutes):** one customer-facing action: outreach, content, community engagement, or follow-up.
4. **Respond (5 minutes):** reply to messages, comments, and inquiries.
5. **Record (5 minutes):** update your lead tracker and note one thing you learned.

If you have more time, extend the Build and Reach blocks. If you have less, never skip Reach. Customer-facing actions are the ones that most directly lead to sales.

Weekly Tasks

- **Monday:** plan the week; batch content.
- **Wednesday:** mid-week check of leads and follow-ups.
- **Friday or Sunday:** weekly review (30 minutes): numbers, wins, lessons, next week's top 3.
- **Weekly:** 20-minute bookkeeping block (Module 2).

Protecting Your Focus

- Work in time blocks with notifications off.
- Keep a "parking lot" list for new ideas so they don't derail today's task.
- Avoid "busywork" (endless logo tweaking, tool hopping) when a customer-facing task is waiting.
- Track your streak. Consistency builds momentum.

Energy and Sustainability

Starting a business while working, studying, or caring for family is demanding. Build in rest. Missing a day is normal; abandoning the plan isn't required. Resume the next day.

EXAMPLE (HYPOTHETICAL): A hypothetical full-time retail employee building a resume-writing business uses her lunch break for "Respond" and "Reach" (replying to inquiries and engaging in two job-seeker communities) and spends 40 minutes after dinner on "Build." She does her weekly review on Sunday mornings with coffee.

AI Prompt: Daily Plan

COPY-AND-PASTE AI PROMPT

```
Today is Day [X] of my 30-day launch plan. Today's planned task:
[TASK]. I have [X] minutes. Other urgent items: [LIST].
Create a time-blocked plan using Plan, Build, Reach, Respond, Record.
Break today's main task into small steps that fit the Build block.
Suggest one specific customer-facing action for the Reach block.
```

AI Prompt: End-of-Day Reflection

COPY-AND-PASTE AI PROMPT

```
Ask me these 4 questions one at a time: What did I complete today?
What customer-facing action did I take? What did I learn? What's my
#1 task tomorrow? Then summarize my answers in 3 lines for my log
and offer one encouraging, practical suggestion (no hype).
```

EXERCISE 9.2: Write your Daily Power Hour schedule on the worksheet: what time each block happens and where you'll work.

LESSON 9.3

Marketing Calendar

The Big Idea

A **marketing calendar** tells you what to publish, where, and when, so you're not staring at a blank screen each day. It connects your content to your goals (awareness, leads, sales) and keeps you consistent.

Building Your 30-Day Marketing Calendar

1. **Choose your channels:** one primary social platform, email, and optionally a secondary platform or Google Business Profile.
2. **Set frequency:** e.g., 3 social posts per week, 1 email per week, 2 Google Business Profile posts per month.
3. **Assign content pillars** (Module 5): educate, show, connect, prove, offer.
4. **Map key dates:** launch day, any real promotions, holidays relevant to your audience, local events.
5. **Batch create** content weekly using AI and your prompt library.
6. **Schedule** using platform tools or a scheduler.

Sample 4-Week Marketing Calendar (Hypothetical Service Business)

Week	Theme	Social posts (3/week)	Email	Other
1	Introduce the problem	Tip post; "why I started" story; myth vs. fact	Welcome email to your first subscribers or network update	Join 2 communities
2	Show expertise	How-to carousel; behind-the-scenes; customer question answered	Helpful tip newsletter	Helpful community posts
3	Launch	Website launch announcement; "how it works" walkthrough; FAQ video	Launch announcement	Personal messages to network
4	Invite action	Offer explainer; tip with soft CTA; "what to expect" post	Offer reminder (no fake urgency)	Follow-ups; GBP post

Content Mix Guideline

A healthy mix for a new business might look like: mostly educational and connecting content, some behind-the-scenes, and a minority of direct offers. Adjust based on what your audience responds to.

AI Prompt: Build My 30-Day Marketing Calendar

COPY-AND-PASTE AI PROMPT

Build a 30-day marketing calendar for [BUSINESS] targeting [AUDIENCE].
Channels: [PRIMARY PLATFORM], email, [OPTIONAL OTHERS].
Frequency: [POSTS PER WEEK], [EMAILS PER WEEK].
Launch date: [DATE]. Real promotions: [DETAILS or "none"].
Content pillars: [PILLARS].
For each scheduled day, give: channel, pillar, post idea, hook (first line), format, and call to action. Present as a table. Honest tone, no hype, no fake urgency.

AI Prompt: Weekly Content Batch

COPY-AND-PASTE AI PROMPT

Using my marketing calendar for Week [X] (pasted below), write all the content pieces: captions, short video scripts, carousel slide text, and the email. Match my brand voice: [VOICE]. Mark places where I should add my own photo, example, or story.
Calendar: [PASTE WEEK]

EXERCISE 9.3: Create your 30-day marketing calendar and batch-create your first week of content.

LESSON 9.4

Website Launch Checklist

The Big Idea

Your website launch is a milestone, but launching with broken forms or wrong prices undermines trust. Use this checklist (expanded from Module 4) before you share your site widely.

The Complete Website Launch Checklist

Strategy

- [ ] Clear headline that says what you do and for whom
- [ ] One primary call to action used consistently
- [ ] Offer, prices (or "starting at"), and next steps are clear

Content accuracy

- [ ] Every page proofread (AI pass plus read-aloud pass)
- [ ] No placeholder text or brackets left
- [ ] Contact info, hours, and service area correct
- [ ] Only genuine reviews and verifiable claims
- [ ] No income or results guarantees

Functionality

- [ ] All links and buttons tested
- [ ] Contact form tested; notification and confirmation emails received
- [ ] Booking calendar tested (if used)
- [ ] Email opt-in tested; lead magnet delivered
- [ ] Checkout tested with a real purchase and refund (if selling)
- [ ] 404 page exists or redirects make sense

Mobile and accessibility

- [ ] Checked on at least one phone and one computer
- [ ] Text readable without zooming; buttons easy to tap
- [ ] Images have alt text; color contrast is sufficient
- [ ] Page loads reasonably fast (check with PageSpeed Insights)

SEO and analytics

- [ ] Title tags and meta descriptions set for key pages
- [ ] Site visible to search engines (not hidden or password-protected)

- [ ] Google Search Console connected; sitemap submitted
- [ ] Analytics installed and recording visits

Legal and trust

- [ ] Privacy policy linked in footer
- [ ] Terms, refund, and shipping policies (as applicable)
- [ ] Cookie consent if required by your tools/audience
- [ ] Business name and contact method visible
- [ ] Affiliate or sponsorship disclosures where needed

Technical

- [ ] Domain connected; HTTPS works on www and non-www
- [ ] Favicon and social sharing image set
- [ ] Business email working
- [ ] Domain auto-renew on; two-factor authentication enabled on key accounts

Launch

- [ ] Website URL added to social profiles, email signature, and Google Business Profile
- [ ] Launch announcement drafted for network, social, and email
- [ ] Analytics baseline noted on launch day

AI Prompt: Final Launch Review

COPY-AND-PASTE AI PROMPT

```
Act as a meticulous website QA reviewer. I'm launching [URL/BUSINESS].
Here is the text of each page: [PASTE]. Check for: unclear messaging,
inconsistent prices or details between pages, missing information
customers need, placeholder text, exaggerated claims, missing calls to
action, and missing policy links. Produce a prioritized fix list.
```

EXERCISE 9.4: Go through the checklist item by item, fix any issues, and record your launch date on the worksheet.

LESSON 9.5

Customer Acquisition Checklist

The Big Idea

Your first customers rarely find you by accident. They usually come from **people you know, people they know, communities you're part of, and direct, respectful outreach.** This checklist gives you a structured approach to finding your first customers.

The First-Customer Playbook

Warm network (Days 18–22)

- [ ] List 50 people you know (friends, family, former coworkers, neighbors, classmates)
- [ ] Send a personal message to at least 20 explaining what you do and who you help
- [ ] Ask for introductions, not just sales: "Do you know anyone who...?"
- [ ] Post a launch announcement on your personal profiles

Communities (ongoing)

- [ ] Join 3 communities where your target customers gather
- [ ] Read and follow each community's rules
- [ ] Make 5+ genuinely helpful contributions before any promotion
- [ ] Share your offer only where permitted

Direct outreach (Days 22–27)

- [ ] Build a list of 25 well-matched prospects or partners
- [ ] Research each and personalize your message
- [ ] Send 5 messages per outreach day
- [ ] Follow up once or twice, politely
- [ ] Track every message in your lead tracker

Partnerships

- [ ] Identify 5 complementary businesses
- [ ] Propose a simple collaboration (referral swap, co-hosted event, guest content)

Local (if relevant)

- [ ] Google Business Profile complete and verified
- [ ] Flyers or cards at permitted community boards (with permission)
- [ ] Attend one local networking event or meetup

Conversion

- [ ] Respond to every inquiry within one business day
- [ ] Use your consultation script or sales page
- [ ] Send proposals or payment links promptly
- [ ] Follow up on every open opportunity

After each new customer

- [ ] Send onboarding/welcome message
- [ ] Deliver excellently
- [ ] Ask for feedback and an honest review
- [ ] Ask if they know anyone else who might benefit

Pricing Your Very First Customers

Some new businesses offer an introductory or "founding customer" price to their first few clients in exchange for honest feedback. If you do this, be transparent: state that it's an introductory price, how many spots or how long it applies, and what you're asking in return (feedback, an honest review if they're happy). Don't create fake scarcity.

AI Prompt: Warm Network Message

COPY-AND-PASTE AI PROMPT

Write a short, personal message I can send to friends, family, and former coworkers announcing my new business [BUSINESS], which helps [AUDIENCE] with [PROBLEM]. Don't sound salesy. Ask them to keep me in mind and to introduce me to anyone who might benefit. Give 3 versions: text message, email, and LinkedIn message. Under 100 words each.

AI Prompt: Founding Customer Offer

COPY-AND-PASTE AI PROMPT

Help me write a transparent "founding customer" offer for my first [NUMBER] clients of [OFFER]. Introductory price: [PRICE] (regular price: [PRICE]). What I ask in return: [e.g., honest feedback, permission to share their review if they're happy]. Make the terms clear and honest, with no fake scarcity. Write a social post and a direct message version.

EXERCISE 9.5: Complete the warm network list (50 names) on your worksheet and send your first 20 personal messages.

LESSON 9.6

Performance Tracking

The Big Idea

At the end of each week and at Day 30, you need to know what's working. You'll track a small set of numbers and honest notes. Early numbers will be small, which is normal. The goal is to learn, not to judge yourself.

Your 30-Day Scorecard

Track these weekly:

Metric	Why it matters
Hours worked on the business	Shows consistency
Customer-facing actions (messages, posts, comments)	Leading indicator of opportunities
Conversations (calls, DMs, inquiries)	Shows interest
Website visitors	Shows reach
Email subscribers	Shows audience growth
Proposals sent / checkout visits	Shows buying intent
Customers won	Outcome
Revenue	Outcome
Expenses	Keeps spending in check

The Weekly Review (30 Minutes)

1. Update the scorecard.
2. What worked this week? (Do more of it.)
3. What didn't? (Change or stop it.)
4. What did customers or prospects say? (Exact words.)
5. What's blocking you?
6. Top 3 priorities next week.

The Day-30 Review

Answer honestly:

- Did you complete the plan's key milestones (offer, website, outreach)?
- How many real conversations did you have with potential customers?
- What did you learn about demand? (Use the evidence ladder from Module 1.)
- Which channel produced the most conversations?
- What do customers or prospects consistently say?
- Should you **continue**, **adjust** (niche, offer, price, channel), or **pivot**?

A common mistake is judging an idea only on revenue after 30 days. Judge it on **evidence**: Are people engaging? Are conversations happening? Is feedback pointing you to a better offer? Many businesses need several cycles of testing and adjustment.

AI Prompt: 30-Day Review Analysis

COPY-AND-PASTE AI PROMPT

```
Here is my 30-day scorecard and notes: [PASTE].
Analyze: what's working, what isn't, which channel shows the most
promise, what customer feedback suggests, and whether the evidence
supports continuing, adjusting, or pivoting. Be honest and specific.
Then propose a focused plan for the next 30 days with weekly goals
based on leading indicators I control.
```

AI Prompt: Scorecard Spreadsheet

COPY-AND-PASTE AI PROMPT

```
Create a weekly scorecard spreadsheet layout for a new business.
Columns: week, hours worked, customer-facing actions, conversations,
website visitors, email subscribers, proposals/checkout visits,
customers won, revenue, expenses, profit (formula), notes.
Add formulas for totals and simple week-over-week change, plus a
conversion rate from conversations to customers. Give Google Sheets
formulas.
```

> **EXERCISE 9.6:** Set up your scorecard and complete your first weekly review.

LESSON 9.7

Next Steps

The Big Idea

Finishing your first 30 days is an accomplishment. You've moved from idea to action. The next phase is about **repeating what works, improving what doesn't, and building systems** so your business can grow sustainably.

Your Next 90 Days: Three Paths

Path A: You have customers or strong interest. Focus on delivering excellently, collecting feedback and honest reviews, refining your offer, and systemizing delivery. Double down on the channel that produced the most conversations. Consider raising prices when your schedule fills up.

Path B: You have interest but few or no sales. Look at your funnel (Module 6). Is the offer clear? Is the price aligned with value? Are you reaching the right people? Are you following up? Make one significant improvement at a time and test it for 2–3 weeks. Have more direct conversations.

Path C: Little interest so far. Revisit Module 1. Go back to the customer problem. Interview 5–10 more people. Consider a narrower niche, a different offer, or a different audience with the same skill. This isn't failure; it's information that many founders gather before finding traction.

Keep Learning (Without Course Hopping)

- Revisit the module that matches your current bottleneck.
- Use free, reputable resources: SBA.gov learning center, SCORE mentoring, your local Small Business Development Center, IRS small business resources, and official platform help centers.
- Join one supportive community of business owners at a similar stage.
- Read your own data and customer feedback; it's specific to your business.

Long-Term Habits of Sustainable Business Owners

1. Talk to customers regularly.
2. Review numbers weekly.
3. Document and improve systems.
4. Protect your time and energy.
5. Keep personal and business finances separate.
6. Stay honest in all marketing and sales.
7. Keep learning, then apply what you learn.

A Final Word

Building a business is a skill, and skills improve with practice. You don't need to have everything figured out. You need the next right step, and then the one after that. You now have a blueprint, a set of tools, and a plan. The rest is execution, learning, and persistence.

AI Prompt: My 90-Day Plan

COPY-AND-PASTE AI PROMPT

I just completed my first 30 days. Situation: [SUMMARY]. Path I'm on (A: customers/strong interest, B: interest but few sales, C: little interest): [PATH]. Key numbers: [SCORECARD]. Customer feedback: [QUOTES]. Create a 90-day plan with 3 monthly themes, weekly goals based on leading indicators, one experiment per month, and the systems I should build. Be realistic about my [HOURS] per week.

AI Prompt: Accountability Partner

COPY-AND-PASTE AI PROMPT

Act as my weekly accountability partner for the next 90 days. Each time I return and say "check-in," ask me: what I committed to last week, what I completed, what got in the way, my numbers, and my top 3 commitments for next week. Keep me honest and encouraging. Point out patterns over time. Start by asking me for my 90-day goal.

EXERCISE 9.7: Choose your path (A, B, or C), write your 90-day goal, and schedule your next three monthly reviews.

MODULE 9

Module 9 Worksheet

Part A: My 30-Day Calendar

Start date: _____ Day 30 date: _____

Week	Dates	Theme	Most important task	Done?
1		Decide and validate		
2		Build the foundation		
3		Launch and reach out		
4		Sell, follow up, review		

Part B: Daily Power Hour

Block	Time	Where
Plan (5 min)		
Build (25 min)		
Reach (20 min)		
Respond (5 min)		
Record (5 min)		

Weekly review day/time: _____

Part C: Marketing Calendar Summary

Week	Theme	Posts planned	Email planned	Other
1				
2				
3				
4				

Part D: Website Launch

Launch date: _____ Checklist complete? Yes / No

Issues found and fixed: _____

Part E: Warm Network and Outreach

Name	Relationship	Contacted (date)	Response	Next step

Part F: 30-Day Scorecard

Metric	Week 1	Week 2	Week 3	Week 4	Total
Hours worked					
Customer-facing actions					
Conversations					
Website visitors					
Email subscribers					
Proposals / checkout visits					
Customers won					
Revenue					
Expenses					

Part G: Day-30 Decision

Continue / Adjust / Pivot (circle one). Why: _____

My path (A / B / C): _____ My 90-day goal: _____

Next three monthly review dates: _____

MODULE 9

Action Checklist

- [ ] Put all 30 days on your calendar with time blocks
- [ ] Set up your Daily Power Hour routine
- [ ] Complete Week 1: direction, niche, problems, demand, offer, price
- [ ] Complete Week 2: name, structure, banking, domain, email, brand, AI assistant, website draft
- [ ] Complete Week 3: website pages, lead capture, SEO, policies, launch, social setup, content batch
- [ ] Complete Week 4: outreach, communities, sales assets, conversations, follow-ups, automation, customer experience
- [ ] Build your 30-day marketing calendar
- [ ] Complete the website launch checklist
- [ ] Contact at least 20 people in your warm network
- [ ] Track your scorecard weekly
- [ ] Complete your Day-30 review and choose your path
- [ ] Write your 90-day plan

MODULE 9

Knowledge Check

1. What is the theme of Week 1 in the 30-day plan?
A) Buy ads
B) Decide and validate
C) Hire contractors
D) Build an app

2. In the Daily Power Hour, which block should you never skip?
A) Plan
B) Reach (customer-facing action)
C) Record
D) None; skip any

3. What's the best source of first customers for most new businesses?
A) Waiting for search traffic
B) Warm network, communities, and respectful direct outreach
C) Buying email lists
D) Viral luck

4. How should a "founding customer" price be presented?
A) With a fake countdown timer
B) Transparently, with clear terms and no fake scarcity
C) As a permanent discount
D) Hidden from customers

5. What's the main way to judge an idea at Day 30?
A) Revenue only
B) Evidence: engagement, conversations, and feedback
C) Number of followers only
D) How you feel that day

6. True or false: If you miss a day of the 30-day plan, you should restart from Day 1.

7. Which is a leading indicator in your 30-day scorecard?
A) Revenue
B) Customer-facing actions
C) Profit
D) Taxes paid

8. If you have interest but few sales (Path B), what should you do?

A) Quit immediately

B) Examine the funnel, offer clarity, pricing, and follow-up; improve one thing at a time

C) Change everything at once

D) Stop talking to customers

MODULE 9

Answer Key

1. **B.** Week 1 is about deciding your direction and validating demand.
2. **B.** Customer-facing actions most directly create opportunities.
3. **B.** Warm network, communities, and personalized outreach are where most first customers come from.
4. **B.** Introductory pricing must be honest and clearly explained.
5. **B.** Evidence and learning matter more than early revenue alone.
6. **False.** Pick up where you are and keep moving.
7. **B.** Customer-facing actions are activities you control that predict future results.
8. **B.** Diagnose the funnel and test improvements one at a time.