

PROGRAM DOCUMENT · INTERNAL WORKING DRAFT

Automate & *Accelerate.*

A complete, session-by-session program for HAE's AI Tools for Small Business course — including challenges, perspectives, prompts, demos, tools, and the artifacts each participant ships.

COURSE

AI Tools for SMB

FORMAT

4 sessions, live

AUDIENCE

Founders, SMBs & their teams

UPDATED

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EXECUTIVE SUMMARY

From "AI demo" to *AI operating system*.

The course has evolved from a Claude Cowork walkthrough into a practical operating-system course for founders, small and medium-sized businesses, and their teams. The strongest insight from across the meetings: SMBs do not need more AI tools — they need a way to reduce tool overload, turn messy business context into usable outputs, and connect AI directly to revenue.

Three forces shaped the new design:

Jack pushed for GTM to be central, not a footnote. **Regina** insisted every workflow had to tie back to revenue — investor network, academy licensing, sponsor growth. **Jamie** kept it grounded in adoption reality: don't overload Session 1, make it promotable, and turn the course itself into its own live case study.

The result: a four-session arc that moves **Workspace** → **Strategy** → **Creative** → **Distribution**, every session producing a real artifact participants leave with.

THE REALITY ON THE GROUND

Seven challenges every SMB hits.

Pulled from real conversations with Regina, Jamie, and the broader HAE community. Each challenge directly shaped a session.

01

Tool overload and fragmented workflows

Notion, Clay, Perplexity, Apollo, Signal, Monday.com, Canva, Gamma, Descript, ChatGPT, Drive, Gmail. Nobody can master ten tools — and each only solves one slice. Data fragments. The "AI stack" becomes another source of complexity.

COURSE IMPLICATION *teach a working layer over the existing stack, not yet another app to learn.*

02

Lack of clean business context

Regina had 3,200 files across 54 desktop folders. Jamie was hand-rebuilding ChatGPT-generated Word docs into PowerPoint. AI performs poorly when context is scattered — the first AI win is usually organizing what already exists.

COURSE IMPLICATION *Session 1 starts with context-building — folders, files, examples, brand voice.*

03

Revenue pressure and budget constraints

Regina was clear: every AI investment has to be justified as a revenue generator, not a productivity perk. Budgets are tight. "Nice-to-have productivity" is not enough.

COURSE IMPLICATION *every session must answer — how does this make money, save time, or avoid an expensive mistake?*

04

Go-to-market uncertainty

Jack's feedback to include GTM was important. Founders need help answering: who is the customer, what is the offer, what channel, what message, what sequence to test, what success looks like.

COURSE IMPLICATION *GTM is Session 2 — central, not a footnote.*

05

Prompting and AI fluency gaps

The biggest blocker isn't intelligence — it's knowing how to ask. Regina noted she would never have naturally written prompts like "Score this from 1 to 100" or "What's the fastest, simplest, easiest way to generate revenue from this?"

COURSE IMPLICATION *teach a small set of durable prompt patterns and apply them immediately to participant work.*

06

Manual workarounds are deeply ingrained

Jamie's old workflow — ChatGPT → copy/paste → manual PowerPoint cleanup — is a classic SMB pattern. People accept rework as normal. AI helps only when the workflow is redesigned, not patched.

COURSE IMPLICATION *show before/after workflows. Make the "old way vs. AI-assisted way" visible.*

07

Setup friction and account confusion

Cowork setup exposed real friction: account switching, plan confusion, connector setup, password issues, Chrome extension hiccups, rate limits, nonprofit pricing questions. Adoption can fail before value is reached.

COURSE IMPLICATION *Session 1 ships a guided setup checklist and a realistic "first hour might feel messy" warning.*

THREE PERSPECTIVES THAT SHAPED THE COURSE

Nathan. Regina. Jamie.

Each brought a different lens — execution, strategy, adoption — and the syllabus reflects all three.

● EXECUTION ————— → ● STRATEGY ————— → ● ADOPTION



"AI as a co-worker, not a chatbot."

01 Do work, don't just answer.

Sharp distinction between chat and Cowork — the latter performs the task on your behalf.

02 Build context first.

Projects, folders, examples, memories, brand voice. AI gets dramatically better with context.

03 Score, critique, refine.

"What am I missing?" "Score this 1–100." "Improve until it reaches the highest score."

04 Tie everything to revenue.

Pushed Regina past list-volume thinking toward warm-intro quality.

05 Iterate aggressively.

Strong outputs rarely come from one prompt. Teach the loop.

06 Produce artifacts.

Every session leaves participants with something useful — brief, page, deck, plan.



"Strategic. Revenue-first."

01 Build an investor network.

Curated VCs, angels, PE for HAE — supporting Demo Day, Startup World Cup, and Nexus Events.

02 Package HAE Academy for licensing.

Sell academy structure to universities. Already in motion in Africa, Kazakhstan, Switzerland.

03 Reduce tool dependence.

Wants fewer tools, less manual work, a foundation she can react to and extend.

04 Competitive positioning matters.

HAE vs. Stanford, MIT, Founder Institute — non-VC, no-equity, founder well-being, emerging markets.

05 Budget discipline.

Start small (nonprofit Claude plan), prove value, upgrade once revenue follows.

06 Quality > volume.

Especially for investor and partner outreach — AI helps generate, but relationships do the work.



ADOPTION

"Operational. Practical. Promotable."

01 Don't overwhelm Session 1.

Felt overwhelmed after the walkthrough — but saw the potential. Make the entry friendly.

02 Polish messy outputs.

The ChatGPT → PowerPoint pain is concrete and common. Teach the redesigned workflow.

03 Use the course to promote the course.

Live meta case study: generate the landing page, posts, eNews, FAQ, follow-ups in class.

04 Borrow the Thought Leadership format.

That session worked because it was participatory. Bring exercises, cohort work, reflection, homework.

05 Move quickly.

U.L. Coleman already inquired after the teaser. Demand exists — don't over-engineer.

06 Practical outcomes > technical features.

The course page should sell what you'll build, not which tools you'll touch.

— THE SHIFT

From tool modules to *business capability* modules.

The original draft was tool-led: Cowork, Marketing, Finance. The new arc is outcome-led — driven by Jack's GTM push, Regina's revenue framing, Jamie's emphasis on

making it ship.

OLD (TOOL-LED)

- Claude Cowork & plugins
 - Marketing & visual tools
 - Finance
 - Follow-up check-ins
-

NEW (OUTCOME-LED)

- i. Set up your AI business workspace
- ii. Build your GTM and revenue engine
- iii. Create marketing campaigns and assets
- iv. Distribute, engage, and follow up

The new arc speaks the language of small-business outcomes — not software. Finance and operations remain available as bonus material, but the capstone now lives where SMBs actually feel friction: distribution.

01

FOUNDATION

Build Your AI Business Workspace

AI as a co-worker, not just a chatbot.

The business problem. Small businesses are drowning in files, emails, half-finished docs, and ten unconnected tools. Before AI can help anyone, it needs business context — and most businesses don't have a structured place to give it.

What participants will learn

Chat vs. agentic work

Setting up Cowork

Projects & memory

Connecting tools

Brand voice & instructions

File organization

Summarization workflows

LIVE DEMO

- Spin up a project for a real business
 - Connect Drive, Gmail, Canva, Gamma
 - Ask AI to organize a messy folder
 - Brief AI on the business and surface gaps
 - Compare a shallow prompt to a high-context prompt
-

HOMEWORK

- One project workspace created
- 3–5 documents uploaded

- One example of strong prior work
- Short instruction set (tone, goals, audience)

PROMPT PATTERNS

- > Review these files and summarize what this business does.
- > Organize this material into a usable project structure.
- > What information is missing for you to help me effectively?
- > Create a simple operating brief for this business.
- > Remember this style and use it in future work.

PARTICIPANT ARTIFACT

An AI-ready business workspace — connected, contextual, and ready to ship work.

02

STRATEGY

GTM, Revenue Strategy & Positioning

Turn scattered ideas into a clear go-to-market plan.

The business problem. Most founders have a product, service, or program — but struggle to define the target customer, message, channel, and offer with enough sharpness for AI to actually help.

What participants will learn

Customer segmentation

Competitive analysis

Positioning & gaps

Value prop sharpening

Revenue scoring

30-day GTM tests

Warm vs. cold strategy

LIVE DEMO (USING HAE EXAMPLES)

- Investor network strategy
- Academy licensing to universities
- Course promotion plan
- Competitive positioning audit (Stanford, MIT, Founder Institute)
- Score: investor outreach vs. licensing vs. membership

HOMEWORK

- One-page GTM brief
- Top 3 customer segments
- One revenue experiment
- One outreach sequence

Key principle to teach

AI can generate lists, but growth depends on relationship quality. Especially for investors, partners, and high-trust sales — the goal is warm intros, credibility, and thoughtful sequencing, not "spray and pray."

PROMPT PATTERNS

- > Analyze my target market and identify the best customer segments.
- > Score these revenue opportunities by speed, effort, upside, and confidence.
- > What is the fastest, simplest, easiest way to generate revenue from this?
- > What are my blind spots?
- > What would a skeptical buyer object to?
- > Create a 30-day GTM test plan.

PARTICIPANT ARTIFACT

A one-page GTM brief and a ranked, time-boxed revenue test plan.

03

CREATIVE

Build Your AI Creative Studio

Move from idea to finished creative — using the new AI design, video, and prototyping stack.



The business problem. *SMBs know what they want to say but lack the time, design resources, or creative production capacity to make high-quality marketing materials quickly.*

The creative stack



Lovart

Campaign concept & visual direction.



Google Stitch

Landing pages & UI from prompts.



Replit

Interactive prototypes & calculators.



HeyGen + Hyperframes

Founder video + scroll-stopping shorts.



Synthesia

Scalable training & enablement video.



Google Flow

Cinematic narrative storytelling.

Session flow

00 Creative brief *first.*

Before tools: who is the audience, what is the offer, what is the message, what channel, what desired action. The brief drives everything.

01 *Lovart* — campaign concept & visual direction

Generate campaign concepts, moodboards, visual identity directions, and ad/social creative directions.

"Create three campaign concepts for a hands-on AI course for small business owners — practical, founder-friendly, not overly technical."

02 *Google Stitch* — landing page & UI design

Generate landing pages, registration flows, lead capture pages, and dashboard UI from prompts.

"Design a landing page for a four-session AI Tools for Small Business course."

03 *Replit* — interactive prototypes

Turn static designs into working pages: landing pages, ROI calculators, AI readiness assessments, lead capture forms.

"Build a calculator that estimates hours saved from AI automation."

04 *HeyGen + Hyperframes* — high-engagement video

HeyGen for human-facing avatar video, founder messages, and personalized outreach.

Hyperframes is the focus for scroll-stopping, visually dynamic short video built for LinkedIn, course promos, webinar promotion, and sales follow-up.

Message → Hook → Video → Per-platform → Critique → Iterate

"AI is not your problem. Tool overload is."

"Most founders use AI like a search box. Here's how to use it like a co-worker."

05 *Synthia* — scalable training & enablement

Course module intros, internal training, product explainers, customer onboarding, sales enablement.

"Turn this course outline into a 90-second training video script."

06 *Google Flow* — cinematic storytelling

Narrative video sequences — problem → tension → transformation → outcome → CTA.

"Create a sequence showing a small business owner overwhelmed by tools, then using AI to organize and grow."

CRITIQUE LOOP (USE ACROSS EVERY TOOL)

- > Score this for clarity, credibility, distinctiveness, and conversion.
- > Make the opening 3 seconds stronger.
- > Create 3 variations for LinkedIn, email, and a landing page.
- > Rewrite this in a warmer, more practical voice.
- > What proof points are missing?

PARTICIPANT ARTIFACT — CREATIVE CAMPAIGN KIT

Concept · Landing page · Interactive prototype · Hyperframes promo · Founder video · Training video · Storyboard · Asset list for distribution.

04

DISTRIBUTION

Sales, Distribution & Engagement

Get the right message to the right people — and keep momentum after the first touch.

The business problem. SMBs often create decent marketing assets but struggle with distribution. They lack a clear list strategy, channel plan, outreach sequence, follow-up process, or engagement system. AI can help — but only if it's pointed at relationships, not volume.

What participants will learn

Audience segmentation

Channel planning

Multi-touch sequences

Persona personalization

Warm-intro plays

Engagement loops

Follow-up systems

LIVE DEMO (REAL HAE EXAMPLES)

- Promote the AI Tools for SMB course
- Engage U.L. Coleman after their inquiry
- Investor-network outreach sequence
- HAE Academy licensing pitch to universities
- Multi-channel distribution (LinkedIn + email + community)

CAPSTONE EXERCISE

- Audience segments defined
- Channel + message mapped per segment
- 4-touch outreach sequence written
- Follow-up plan with branching logic
- Metrics to track weekly

Key principle to teach

AI helps generate lists and messages, but distribution is not just volume. For high-trust audiences — investors, partners, sponsors, enterprise buyers — the goal is better targeting, warmer intros, higher-quality engagement, and clearer follow-up. Not "spray and pray."

PROMPT PATTERNS

- > Segment this audience into priority groups and explain why.
- > Create a distribution plan across LinkedIn, email, partners, and community.
- > Write a 4-touch outreach sequence for this persona.
- > Personalize this message for these 3 buyer types.
- > What objections will this audience have?
- > Create a follow-up plan for people who clicked, replied, attended, or ignored.
- > Design an engagement loop that turns interest into conversations.
- > Score this outreach for relevance, credibility, and likelihood of reply.

PARTICIPANT ARTIFACT — DISTRIBUTION & ENGAGEMENT PLAN

Segments · channels · sequences · follow-up logic · weekly engagement rhythm.

FINAL RECOMMENDATION

Frame the course as ***execution***,
not exposure.

The strongest version of this course is not "AI Tools for Small Business" as a tour. It is AI for Small Business Execution — and the promise is that participants leave with working assets, not just knowledge.

Run every session around three elements

- i.** **Business problem** — what's actually painful for the participant right now.
- ii.** **Live AI workflow** — demonstrated end-to-end, with prompts on screen.
- iii.** **Participant artifact** — they leave the session with a real, working output.

The four-session arc, at a glance

- i.** **Build Your AI Business Workspace** — connect, contextualize, organize.
- ii.** **GTM, Revenue Strategy & Positioning** — sharpen audience, offer, and growth path.
- iii.** **Build Your AI Creative Studio** — Lovart, Stitch, Replit, HeyGen + Hyperframes, Synthesia, Flow.
- iv.** **Sales, Distribution & Engagement** — segment, sequence, follow up, build relationships.

That structure keeps the course practical, reduces overwhelm, and gives HAE a built-in promotional flywheel — every cohort produces real artifacts, real testimonials, and real demand for the next round.