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FREE BUSINESS RESOURCE

AI Advantage for Local Business

Two-hour facilitator guide

Practical guidance for business owners and leaders

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How to use this guide

This is a facilitator-ready teaching guide, not a technical manual. Read it completely before delivery, rehearse the demonstrations with fictional information, and keep the participant workbook open during the course. The objective is not to make participants AI experts. The objective is to help them select one useful workflow, use AI as an assistant, apply responsible human review and build a measured 30-day pilot.

Core teaching principle: AI may assist the work. A qualified person remains responsible for the facts, decision, customer promise and outcome.

Facilitator boundaries

- Do not promise guaranteed savings, accuracy, compliance, revenue or business results.
- Do not use real confidential customer, employee, applicant or company information in demonstrations.
- Do not recommend that AI make final legal, tax, financial, medical, employment, licensing, safety or other high-impact decisions.
- Do not present generated citations, calculations, prices, availability, credentials or claims as verified until a responsible person checks them.
- State clearly when an example is fictional, an inference or a recommendation.

AI concepts the facilitator must understand

Term	Plain-language explanation	Teaching point
Artificial intelligence	A broad category of computer systems that perform tasks associated with prediction, classification, pattern recognition or content generation.	AI is an umbrella term; capabilities and risks vary by system.
Generative AI	AI that produces new text, images, audio, video or code in response to instructions and context.	The output is generated from patterns; it is not automatically a verified fact.
Prompt	The instructions, context, examples and requested format supplied to the system.	Better instructions improve usefulness but do not guarantee correctness.
Model	The trained system that produces a result from an input.	Different tools and versions can produce different answers.
Hallucination	A confident-sounding output that is unsupported, incorrect or fabricated.	Never use confidence of tone as proof of accuracy.



Term	Plain-language explanation	Teaching point
Human review	A qualified person checks the output before it influences action or reaches a customer.	Review must match the consequence of being wrong.
Automation	Technology completes steps with limited human action.	Automating a weak or unsafe process makes the problem faster.

What generative AI does well

- Creates first drafts from supplied facts
- Summarizes and reorganizes text
- Suggests alternatives, questions and outlines
- Converts approved information into different formats
- Helps identify patterns in material a person is authorized to provide

What it does not guarantee

- Truth, completeness or current information
- Professional judgment or legal compliance
- Fairness or freedom from bias
- Confidentiality across every tool and account type
- Correct calculations, citations, diagnoses, estimates or safety conclusions

Pre-course preparation

When	Facilitator task
3-7 days before	Confirm audience, room, accessibility needs, internet, projection and approved tools. Review industry examples and remove any that do not fit the audience.
1 day before	Rehearse both demonstrations. Save screenshots or printed outputs as a backup. Confirm every example is fictional or approved.
30 minutes before	Test display, login, font size and links. Place workbooks, pens and readiness checklists. Write the learning outcomes where everyone can see them.
At the start	State the privacy rule, human-review rule and course scope before opening any AI tool.

Room and materials

- Projector or large display with readable zoom
- Reliable internet plus saved demonstration outputs



- Participant workbook and AI Readiness and Risk Checklist
- Two fictional business examples relevant to the audience
- Visible timer, pens and note paper
- A method for anonymous questions when participants are hesitant

Timed run of show

Time	Facilitator action	Evidence of learning
0-5	Welcome, purpose and boundaries	Participants understand this is a practical introduction
5-15	Explain AI, generative AI and human accountability	Participants name one strength and one limitation
15-35	Map business workflows	Each participant identifies two candidate tasks
35-55	Walk through category examples	Each participant selects one use case
55-65	Break	
65-75	Demonstrate weak versus structured instructions	Participants identify missing context and guardrails
75-85	Prompt-building exercise	Each participant drafts one prompt
85-105	Risk screen and group discussion	Participants identify review and escalation rules
105-118	30-day plan	Each participant assigns an owner and metric
118-120	Commitment and close	Each participant states the first action

Segment 1 Welcome and boundaries 0-5 minutes

Say

“Today is about using AI as a supervised business assistant. It can help draft, organize, summarize and explore. It does not remove our responsibility for facts, privacy, safety, customer promises or decisions. We will use only fictional or approved information.”

Ask



“In one phrase, what do you most hope AI could improve in your work?” Take three or four answers. Do not debate tools yet; group answers into time, quality, growth or customer experience.

Check

Ask one participant to repeat the human-review rule. Correct gently if the answer suggests AI is the final decision-maker.

Segment 2 AI without the hype 5-15 minutes

Teach

Explain the glossary in plain language. Emphasize that generative AI predicts and constructs an output from patterns and context. It can be useful even though it can also be wrong. Avoid saying the system “knows,” “understands” or “thinks” in the same way a person does.

Demonstrate

Show a short fictional customer note and ask the tool to summarize it. Then show that the summary must be checked against the original. Point out one correct detail, one omitted detail and one interpretation.

Debrief

- What did the tool do quickly?
- What still required judgment?
- What could have gone wrong if the summary went directly to a customer?

Segment 3 Workflow mapping 15-35 minutes

Teach the task test

A strong first use is frequent, time-consuming, language- or information-heavy, low consequence if caught during review, and easy for a qualified person to verify. A weak first use involves irreversible action, restricted data, high-impact decisions or results that are difficult to check.

Facilitate the exercise

- Ask participants to list four recurring tasks in the workbook.
- Circle tasks involving drafting, organizing, summarizing, comparing or preparing.
- Cross out tasks where an error could immediately affect safety, rights, money or compliance.
- Select one task with an obvious reviewer and measurable baseline.



Coach with questions

- How often does this occur?
- What information does the task require?
- Who currently approves it?
- What does a good result look like?
- What is the consequence if the draft is wrong?

Segment 4 Category examples 35-55 minutes

Use only categories represented in the room. For each example, teach the pair: useful assistance plus required safeguard.

Category	Useful assistance	Required safeguard
Contractor or home service	Turn approved site notes into a scope outline.	Estimator verifies measurements, conditions, price, code, exclusions and warranty.
Professional service	Create a research outline or compare supplied documents.	Qualified professional verifies authorities, conclusions and confidentiality.
Real estate or property management	Draft tenant, owner or vendor communications.	Verify property facts, fair housing rules, disclosures and authorization.
Retail or hospitality	Draft FAQs, product descriptions or guest responses.	Verify pricing, availability, allergy or safety information and advertising claims.
Health, wellness or personal care	Draft general education and scheduling messages.	No diagnosis or treatment decision; protect sensitive information.
Nonprofit or community organization	Organize grant requirements or volunteer communications.	Verify eligibility, reporting claims and donor or beneficiary privacy.

Transition to break

Ask each participant to write one selected use case and one safeguard. Tell them the next section will turn that use case into clear instructions.

Segment 5 Prompt demonstration 65-75 minutes

Weak request



“Write a marketing campaign for my company.”

Ask the group what is missing: audience, objective, approved facts, offer, channels, prohibited claims, tone, format and review. Explain that a vague request forces the system to fill gaps with assumptions.

Improved request

“Using only the approved facts below, create three campaign concepts for homeowners considering an exterior project in the next six months. For each, provide the customer problem, educational message, proof required, channel and call to action. Do not invent prices, reviews, warranties, credentials or results. List questions before drafting if information is incomplete.”

Model the review aloud

- Separate supplied facts from generated suggestions.
- Circle every claim that needs proof.
- Check whether the audience, goal and requested format were followed.
- Remove invented facts, urgency, testimonials, guarantees or credentials.
- Decide whether the draft is safe to revise, must be regenerated or should be discarded.

Segment 6 Participant prompt practice

75-85 minutes

Give participants six minutes to use the workbook structure: role, goal, approved context, constraints, output format, uncertainty and review. Then pair participants for a four-minute peer review.

Peer-review questions

- Is the business objective specific?
- Does the prompt identify approved facts rather than ask the tool to invent them?
- Are prohibited actions and sensitive information addressed?
- Is the requested output easy to review?
- Does the prompt tell the system to ask questions or mark uncertainty?

Segment 7 Risk and responsible use

85-105 minutes

Teach the consequence principle



The higher the consequence of being wrong, the stronger the review, testing, authorization and documentation must be. Some uses should not proceed without legal, security, privacy, HR, safety or professional review.

Risk	Example	Facilitator response
Privacy	A participant proposes pasting a customer list into a public tool.	Stop the example. Use fictional data and direct the organization to its approved-data policy.
Accuracy	The tool invents a citation or product fact.	Return to the original source; do not repair from memory.
Bias or fairness	A tool ranks applicants or customers.	Do not position this as a beginner pilot; escalate for qualified review.
Security	A message asks the user to reveal passwords or confidential files.	Never enter credentials; report through the organization's security process.
Misleading claims	AI drafts a guarantee, testimonial or unsupported performance claim.	Remove it and verify all advertising claims before use.
Overreliance	A manager wants automatic sending without review.	Require human approval until risk, testing and accountability justify any automation.

Risk discussion scenarios

- A contractor asks AI to determine whether a wall is load-bearing from one photo. What must happen instead?
- A manager wants AI to reject applicants based on resumes. Why is this high impact?
- A company wants to paste recorded sales calls into a tool. What permissions and privacy questions arise?
- AI produces a polished competitor statistic with no working source. What is the correct response?

Segment 8 The 30-day pilot 105-118 minutes

Facilitate

Participants complete every row of the action plan. Do not accept “use AI for marketing” as a pilot. Require a specific task, owner, approved information, review checklist, sample size, metric and stop condition.

A complete example

Field	Example
Business problem	Customer follow-up emails take too long and vary in quality.



Field	Example
Workflow	Draft a response from approved, non-sensitive job notes.
Owner	Customer service manager.
Human review	Verify names, dates, commitments, pricing and tone before sending.
Pilot	10 drafts over 30 days; nothing sends automatically.
Measure	Drafting time, corrections per draft and customer-response time.
Stop conditions	Sensitive data exposure, repeated fabricated facts, unacceptable tone or no measurable improvement.

Segment 9 Commitment and close 118-120 minutes

Say

“Useful AI adoption begins with one problem, one responsible owner, one controlled workflow and one measurement. Start small, verify the work and earn the right to expand.”

Collect

- Selected use case
- Named owner
- First action within seven days
- Metric for the 30-day review

Common participant questions and accurate responses

Question	Facilitator response
Is AI always accurate?	No. Generated outputs can be incomplete, wrong or fabricated. Important information must be verified against authoritative sources.
Will better prompting eliminate errors?	No. Clear instructions improve usefulness, but they do not guarantee truth, fairness, security or compliance.
Can we paste customer information into an AI tool?	Only when the organization has approved the tool, account, purpose and information under its privacy and security policies. Use fictional data in this course.



Question	Facilitator response
Will AI replace employees?	This course does not predict staffing outcomes. Focus on redesigning specific tasks responsibly, involving affected people and measuring the actual result.
Which AI tool is best?	There is no universal best tool. Evaluate the task, data protections, capabilities, cost, accessibility, integration, support and risk.
Can AI write contracts, diagnose problems or make hiring decisions?	It may assist with limited preparation under qualified oversight, but it should not be positioned here as the final authority for high-impact professional decisions.
How do we know whether the answer is trustworthy?	Trace important claims to authoritative sources, check calculations and dates, compare with supplied facts, test edge cases and use a qualified reviewer.

Knowledge check and answer key

Question	Expected answer
What is the role of AI in this course?	A supervised assistant for defined tasks, not the accountable decision-maker.
Name two strong beginner tasks.	Examples: drafting from approved facts, summarizing supplied text, organizing notes or creating a checklist.
What is a hallucination?	A confident-sounding output that is unsupported, incorrect or fabricated.
Does a detailed prompt guarantee accuracy?	No. It improves direction but human verification remains necessary.
What information is used in demonstrations?	Fictional or specifically approved information only.
What makes a 30-day pilot complete?	Specific problem, workflow, owner, approved data, review process, sample, metric and stop conditions.

Delivery troubleshooting

Situation	Response
Internet or tool failure	Use saved outputs. Teach comparison and review; the learning objective does not depend on a live response.
AI gives a harmful or inappropriate answer	Stop, do not normalize it, identify the failed safeguard and use it to teach escalation.
Participant shares sensitive information	Interrupt respectfully, remove it from display, do not repeat it and follow the organization's incident process.



Situation	Response
Audience becomes tool-focused	Return to workflow, risk, review and measurement. The course is tool-neutral.
Participant challenges a fact	Thank them, distinguish verified source from interpretation and record any item requiring post-session confirmation.
Time runs short	Protect the risk screen and 30-day plan; shorten category examples and open discussion.

Facilitator quality standard

Area	Standard
Accuracy	Distinguish sourced facts, examples, assumptions and recommendations.
Safety	Use fictional or approved information and stop risky demonstrations.
Engagement	Use the say-demonstrate-practice-debrief rhythm; avoid lecture blocks longer than 15 minutes.
Application	Every participant leaves with a specific pilot, owner and metric.
Measurement	Collect completion, confidence and action-plan evidence.
Accessibility	Use readable display size, describe visual changes, allow written reflection and explain unfamiliar terms.
Escalation	Refer legal, privacy, security, employment, safety and compliance questions to qualified professionals.

Post-course follow-up

- Within 24 hours: send approved resources and restate privacy and review rules.
- Within 7 days: ask whether the first pilot action occurred.
- At day 30: review evidence and decide to adopt, revise or stop.
- Record recurring questions for future facilitator calibration.
- Do not describe attendance as certification, verified-provider status or guaranteed competence.



Sources and responsible-use note

This publication is educational and does not replace legal, tax, cybersecurity, employment, licensing or other professional advice. AI outputs may be incomplete, inaccurate or inappropriate. Keep a qualified person responsible for review and decisions.

U.S. Small Business Administration - Market research and competitive analysis

[Open official source](#)

National Institute of Standards and Technology - AI Risk Management Framework and Generative AI Profile

[Open official source](#)

Federal Trade Commission - Advertising and marketing guidance

[Open official source](#)

U.S. Census Bureau - Business Trends and Outlook Survey

[Open official source](#)

Federal Reserve Banks - Small Business Credit Survey

[Open official source](#)

Research date: September 2026. Review time-sensitive claims and rules before relying on them.



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