

Business Growth

AI Summit

Study Guide

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AI FOR BUSINESS SUMMIT

Rethink. Refocus. Refine.

Practical Strategies to Leverage AI, Streamline Workflows,
Create Better Content, and Keep the Human Touch

Presented by Ford Saeks

WELCOME

AI is not about chasing the latest tools.

It is about solving the right business problems faster, improving the customer experience, empowering your team, and creating more profitable outcomes.

This handout is designed to help you move from ideas to implementation.

What this handout will help you do:

- Spot the best opportunities for AI in your business
- Create a stronger AI-ready foundation
- Improve your prompting and workflows
- Use AI for content, video, and automation
- Protect the human touch
- Build a 30-day Massive Action Plan

SECTION 1: THE MINDSET SHIFT

AI will not fix a weak strategy.

AI will amplify whatever already exists. That means your thinking, your systems, your messaging, and your execution matter more than ever.

Start here:

- Keep the human in the loop
- Stay curious
- Focus on outcomes, not hype
- Do less, better
- Relevance matters when knowledge becomes a commodity
- Ask this before every task: learn it, delegate it, automate it, or outsource it?

Rethink. Refocus. Refine.

Rethink how work gets done.

Refocus on the highest-value activities.

Refine your systems, prompts, and processes over time.

Better questions to ask:

- What problem are we really trying to solve?
- Where can AI improve speed, clarity, or consistency?

- Where do we still need human judgment, empathy, and oversight?
- What would success look like if this worked?

Action Step:

Identify your top 3 friction points in marketing, sales, operations, or customer experience.

SECTION 2: THE FOUR LEVELS OF AI INTEGRATION

Do not start by buying more tools.

Start by understanding where AI fits into your business.

Level 1: Conversational AI

Use tools like ChatGPT, Claude, Gemini, or Perplexity for:

- Brainstorming
- Writing
- Summarizing
- Problem-solving
- Research
- Planning

Level 2: Specialty AI Tools

Use AI-powered apps built for specific functions such as:

- Video creation
- Image generation
- Voice cloning
- Presentation building
- Note-taking
- Sales enablement

- Customer support

Level 3: AI + Team Collaboration

Use AI across teams with:

- Custom GPTs
- Projects
- Shared prompt libraries
- Internal knowledge files
- Approved brand and messaging docs

Level 4: Workflow Automation

Connect systems and automate repeatable work using:

- Zapier
- Make
- n8n
- AI-triggered workflows
- Robotic process automations

Key point:

The goal is not just AI usage. The goal is smarter execution, better decisions, and stronger business results.

Action Step:

Choose one task from each level and identify where it could help your business right now.

SECTION 3: BUILD YOUR AI-READY FOUNDATION

One of the biggest mistakes businesses make is asking AI to create great output without giving it the right inputs.

Create an AI Training Docs folder so your tools and teams work from the same source of truth.

Include these documents:

- AI Ready Blueprint
- Brand Voice Guide
- Value Propositions
- Problems, Consequences, Solutions, Results
- Sales and Marketing Dictionary
- Ideal Client Profiles
- MMM Messaging Framework
 - Benefits = Why
 - Target Markets = Who
 - Marketing Methods = How
- Testimonials and Case Studies
- Frequently Asked Questions
- Objection Handling Notes
- Call-to-Action Library
- Product and Service Descriptions

- Content Calendar
- Webinar and Video Scripts
- SOP Library
- Compliance and Approved Claims Notes

Also create:

- A safe sandbox folder for experiments
- A workbench folder for drafts
- A final approved folder for published assets

This keeps your data cleaner, your output stronger, and your team more aligned.

Action Step:

Build one master folder this week and upload only approved materials.

SECTION 4: PROFILE DEFAULTS, PRIVACY, AND SAFE SANDBOXES

AI gets better when you set better guardrails.

Best practices:

- Set profile defaults and custom instructions
- Decide what data is safe to upload
- Keep sensitive files separate
- Duplicate documents into sandbox folders before testing
- Review AI-generated output before publishing
- Define who approves final content
- Create clear rules for privacy, compliance, and data protection

Simple traffic-light rule:

Green:

Public marketing content, approved messaging, FAQs

Yellow:

Internal drafts, SOPs, training docs, non-sensitive workflows

Red:

Confidential financials, private client data, legal records, protected personal information

Remember:

- Human oversight matters
- Bias is real
- Privacy matters
- Security matters
- Compliance matters
- Trust matters

Action Step:

Create a one-page AI Use Policy for your team.

SECTION 5: PROMPTING THAT GETS BETTER RESULTS

Better prompts create better outputs.

Treat AI like a collaborator, not a search box.

The CECH Method

C = Clarify the goal

What do you want the AI to help you accomplish?

E = Explain the context

What background, examples, audience details, or constraints matter?

C = Create the requirements

What must be included, avoided, or prioritized?

H = Hand over the format

How should the response be structured?

Prompting best practices:

- Start with a clear goal
- Give context
- Be specific
- Ask for a format
- Keep threads shorter
- Summarize long threads

- Save winning prompts
- Refine through follow-up questions
- Use examples whenever possible
- Compare results across multiple LLMs using the same prompt
- Ask the AI to confirm understanding before proceeding

Power phrases:

- My goal is...
- Key requirements include...
- Please confirm you understand...
- Ask clarifying questions before proceeding...
- Success looks like...

Red flags:

- Generic responses
- Missing requirements
- Weak tone alignment
- Bad assumptions
- Incomplete output

Action Step:

Take one real business challenge and refine your prompt three times before accepting the output.

SECTION 6: AI ASSISTANTS, AGENTS, AND AUTOMATIONS

There is a big difference between asking AI a question and assigning AI a job.

Use AI Assistants for:

- Brainstorming
- Summarizing
- Rewriting
- Outlining
- Idea generation
- Research support

Use AI Agents for:

- Multi-step tasks
- Competitor research
- Meeting prep
- Report generation
- Scheduling
- Content repurposing
- Workflow execution

Use Automations for:

- Lead routing
- CRM updates
- Follow-up sequences
- Proposal triggers
- Notifications
- File movement
- Repetitive admin tasks

Platforms mentioned in the summit:

- Claude coworkers
- ChatGPT Agent mode
- Perplexity Comet Browser
- Zapier
- Make
- n8n
- Claude Code

Smart use cases:

- Meeting summaries and action items
- Proposal drafts

- Lead follow-up
- Inbox triage
- Research reports
- SOP creation
- Content repurposing
- Customer routing
- Internal knowledge assistants

Action Step:

Pick one repeatable workflow that costs your team time every week and assign a pilot AI solution to it.

SECTION 7: DISCOVERY HAS CHANGED - SEARCH, SCROLL, STREAM, SHOP

The traditional funnel is no longer enough.

Today's buyer journey is nonlinear. People discover, evaluate, and decide across multiple platforms and formats before they ever visit your website.

The new buyer journey:

- Search: Google, AI answers, YouTube, voice, reviews
- Scroll: Social feeds, short-form content, posts, ads
- Stream: Video, webinars, podcasts, live sessions
- Shop: Website, landing pages, ecommerce, direct outreach

What this means:

- Blogs alone are not enough
- Visibility is not enough
- Influence matters more than impressions
- Your content must be discoverable across text, image, video, and voice

Build an Influence Map

Map where your ideal buyer:

- First hears about you

- Learns from you
- Trusts you
- Compares you
- Decides to act

Action Step:

Sketch your Influence Map and identify the top 5 touchpoints that influence a buying decision before your prospect ever reaches your site.

SECTION 8: THE POWER OF VIDEO

Video is no longer optional.

It builds trust faster, increases discoverability, and helps your ideas travel further.

Use this sequence:

Outcome > Purpose > Action Plan

Before creating any video, ask:

- What outcome do I want?
- What is the purpose of this video?
- What action should the viewer take next?

Video workflow:

- Record
- Edit
- Publish
- Promote
- Repurpose

What to create:

- Video Sales Letters
- Talking-head videos

- Avatar videos
- Explainers with B-roll and graphics
- How-to videos
- Testimonials
- Course content
- Masterclass clips
- Lead magnets
- SOP videos
- Multilingual content

Repurposing rule:

One core idea should become:

- One article
- One short video
- One reel
- One email
- One FAQ
- One social post
- One lead magnet section
- One webinar talking point

Action Step:

Turn one presentation, podcast, or webinar into 10 content assets this month.

SECTION 9: START WITH 3 CORE TOOLS, NOT 30

Most people get overwhelmed because they collect tools instead of building systems.

Start with 3 core tools, one in each category.

Category 1: Thinking and Research

Examples:

- ChatGPT
- Claude
- NotebookLM
- Perplexity

Category 2: Content and Creation

Examples:

- Gamma
- HeyGen
- ElevenLabs
- Captions
- Opus Clip

Category 3: Workflow and Automation

Examples:

- Zapier
- Make
- n8n
- Claude Code

Bonus Category: Input and Speed

Examples:

- Wispr for voice input

Simple rule:

Pick tools based on the job to be done, not the hype.

Action Step:

Choose your 3-tool starter stack and define exactly what each one is responsible for.

SECTION 10: PROTECT THE HUMAN TOUCH

AI can speed up tasks.

Humans build trust.

Keep humans at critical touchpoints:

- Emotionally sensitive conversations
- Complex decisions
- Sales conversations
- Hiring decisions
- Conflict resolution
- High-value client relationships
- Final approvals

Use AI for:

- Routine tasks
- First drafts
- Summaries
- Scheduling
- Analysis
- Pattern recognition
- Repetitive communication

Use humans for:

- Empathy
- Ethics
- Creativity
- Nuance
- Judgment
- Relationship-building

Never forget:

Your competitive edge is not automation alone.

Your edge is how well you combine AI efficiency with human authenticity.

Action Step:

Audit one customer-facing process and identify where AI helps and where a human should step in.

SECTION 11: YOUR MAP - MASSIVE ACTION PLAN

Inspiration is not the goal.

Implementation is.

Your next 30 days:

Week 1: Audit

- Identify 3 business bottlenecks

- Choose 1 pilot use case
- Decide what success looks like

Week 2: Prepare

- Build your AI Training Docs folder
- Set your profile defaults
- Create a sandbox workspace
- Define privacy rules

Week 3: Implement

- Launch one AI assistant
- Test one AI agent
- Automate one repeatable workflow
- Create one repurposing system

Week 4: Measure

Track:

- Hours saved
- Speed gained
- Quality improved
- Leads generated
- Response time

- Cost reduced
- Content produced
- Customer experience impact

Monthly review questions:

- What worked?
- What failed?
- What should we improve?
- What should we stop doing?
- What should we scale next?

Action Step:

Commit to one AI pilot, one workflow automation, and one content repurposing system in the next 30 days.

SECTION 12: QUICK ATTENDEE WORKSHEET

My top 3 business challenges:

1. _____

2. _____

3. _____

One task I can automate:

One task I should keep human-led:

One AI assistant I will build:

One workflow I will improve in the next 30 days:

My 3-tool starter stack:

1. _____

2. _____

3. _____

My next action:

FINAL THOUGHT

AI is not about replacing people.

It is about helping smart people do better work, make better decisions, and create better results faster.

The businesses that win will not be the ones with the most tools.

They will be the ones with the clearest strategy, the best execution, and the strongest human touch.

NEXT STEP

Ready to turn this into a polished branded handout, workbook, or attendee guide? Book an AI Mindshift strategy session and let's make it event-ready.