



ROMAIX

A WORKSHEET GUIDE

Starting Out with AI

Six steps to find where AI helps your business,
before you buy anything.

1 Your business

2 Where work gets stuck

3 Your systems

4 Ask an AI assistant

5 Ideas to consider

6 Pick one

BEFORE YOU START

Start from the business, not the tool.

Most people start with a tool. Someone shows them a chatbot or an app, and they look for a place to put it. This guide works the other way round.

You start with your own business: what you sell, who you serve, who does the work. Then you follow the work and see where it gets stuck. Only after that do you look at tools.

The step that holds the rest up is rarely the one people point at first. It is often a small wait, a question answered for the tenth time, or a list that someone copies by hand every Friday.

And it is not always AI that fixes it. Sometimes a form, a shared calendar or a clear rule does the job. That is a good outcome too.

HOW TO USE THIS GUIDE

- ✓ Set aside about an hour. Print it, or fill it in on screen.
- ✓ Answer in your own words. Short notes are enough.
- ✓ Steps 1 to 3 describe your business. Step 4 turns them into one question for an AI assistant.
- ✓ A person keeps the decisions. Every idea in this guide leaves the final say with you or your team.

WHAT YOU END UP WITH

01 A short picture of your business, your customers and your team

02 The places where work waits, and who it waits for

03 A prompt for an AI assistant, built from your own answers

04 One step worth fixing first, measured before you change anything

STEP 1 OF 6

Your business

Describe your business as you would to a new colleague on their first day.

What do you sell?

Your main products or services, in a sentence or two.

Who do you serve?

Your customers. Who are they, and how do they usually find you?

Who is on your team?

Each person, and what they spend most of their week on.

PERSON OR ROLE	WHAT FILLS THEIR WEEK

STEP 2 OF 6

Where work gets stuck

Pick one real job from last month. Follow it from the first enquiry to the invoice.
Write down each step, and where it waited.

#	WHAT HAPPENS	WHO DOES IT	WAITS FOR	HOW LONG
1	<i>An enquiry comes in</i>			
2				
3				
4				
5				
6				
7	<i>The invoice goes out</i>			

Questions you answer again and again

By phone, email, WhatsApp or at the counter.

Things done after hours

What gets done in the evening or at the weekend, and by whom?

STEP 3 OF 6

Your systems

Tick what you use and write down what you use it for. Add the name of the tool if you know it. Include the informal ones, like a notebook or a WhatsApp group.

	SYSTEM	WHICH TOOL	WHAT WE USE IT FOR
☐	Email		
☐	Calendar		
☐	Spreadsheets		
☐	Website and forms		
☐	Booking system		
☐	Accounting and invoicing		
☐	Customer list or CRM		
☐	Social media		
☐	WhatsApp or other chat		
☐	Phone and voicemail		
☐	Paper, notebooks, whiteboard		
☐	<i>Other:</i>		
☐	<i>Other:</i>		

Tip: circle the places where the same information is typed in twice. Those are often the first places worth a look.

STEP 4 OF 6

Ask an AI assistant

Copy the prompt below into an AI assistant such as ChatGPT, Claude or Gemini.

Fill in the brackets with your answers from steps 1 to 3.

PROMPT

COPY AND FILL IN

I run a [type of business] serving [who your customers are].

My team: [each person and what they spend their week on].

We use these systems: [your tools from step 3, and what each is for].

This is where work gets stuck: [the waits, repeated questions and after-hours work from step 2].

Suggest three to five ways AI or automation could help, starting with the one that saves the most time. For each one, tell me:

- what it does
- which of my systems it connects to
- what a person still decides
- what could go wrong.

CHECK THE ANSWERS

An AI assistant can sound sure and still be wrong. Treat its ideas as a first list to think about, not a plan. Ask it follow-up questions, and ask what it is unsure of.

KEEP CUSTOMER DATA OUT

Never paste customer names, email addresses, phone numbers or other personal details into the prompt. Describe the situation in general terms instead.

Ideas worth keeping

Write down the suggestions that made sense to you.

STEP 5 OF 6

Ideas to consider

Four kinds of help we see fit many businesses. Compare them with what the AI assistant suggested. Tick the ones that match a problem you wrote down.

☐ **Questions and booking requests, day and night****THE PROBLEM**

Customers ask the same questions and want to book outside opening hours. They wait, or go elsewhere.

WHAT IT LOOKS LIKE

An assistant on your website answers common questions from your own information and takes booking requests at any hour.

STAYS WITH A PERSON

Confirming every booking, and any question it cannot answer.

☐ **Social media posts from the work you already do****THE PROBLEM**

Good work happens every week, but nobody has time to write about it.

WHAT IT LOOKS LIKE

Posts drafted from your jobs, photos and notes, in your own words and style.

STAYS WITH A PERSON

Approving every post before it goes out.

☐ **Repeat work connected between your tools****THE PROBLEM**

The same details are copied from one place to another by hand, and follow-ups get forgotten.

WHAT IT LOOKS LIKE

A form on your website fills in your spreadsheet, and a follow-up email goes out on time. It uses the tools you already have.

STAYS WITH A PERSON

Deciding what the follow-up says, and handling anything unusual.

☐ **Being found by AI assistants****THE PROBLEM**

More people ask ChatGPT and similar assistants for a recommendation. If they cannot read your website, you are not in the answer.

WHAT IT LOOKS LIKE

Your website set up so AI assistants can find it, read it and describe what you do correctly.

STAYS WITH A PERSON

What your business says about itself.

None of these is right for every business. The right one is the one that matches a step you wrote down in step 2.

STEP 6 OF 6

Pick one

Do not try to fix everything at once. Choose the one step that holds the most work up. Fix that first, and see what changes.

The one step worth fixing first

From step 2. Why this one?

Measure it now

Write down how it is today, so you can judge the fix later. A rough estimate is fine.

	TODAY	AFTER THE FIX
How often does it happen? per day or week		
How long does it take each time? minutes or hours		
Who does it?		
How long does the customer wait?		
What goes wrong now and then?		

What a person still decides

Whatever you build or buy, write down which decisions stay with you or your team.

FREE TOOLS

Try it on your own business

Four free tools that go with this guide. Each one takes a few minutes, and none needs an account.

01 Your content calendar

Type your web address. Get your content series and a first week of posts, built from your own website.

`romaix.ai/tools/content-calendar`

02 AI-visibility scan

A scan that reads your website the way ChatGPT and Perplexity read it, and lists what to fix.

`romaix.ai/scan`

03 Audit

We map how work actually moves through your business, before anything is proposed. More on the next page.

`romaix.ai/services/audit`

04 Time-lost calculator

Enter one task that keeps coming back. See the hours it costs you a week, a month and a year. Handy for step 6.

`romaix.ai/tools/time-lost`

All four: `romaix.ai/tools`

NEXT STEP

Would you rather have us look into it?

This guide gets you a long way on your own. If you would rather have someone go through it with you, we run a free audit of your business.

01 We follow real jobs

We trace real work through your business, from the first enquiry to the invoice, with you and your team.

02 We find the one step worth fixing first

The step that holds the rest up, which is not always the one people point at first.

03 You get a map and a ranked list

A map of how work moves through your business, and a ranked list of what to fix and why.

04 The decision is yours

Building anything is a separate decision, and it is yours to make.

Get a free audit →

romaix.ai/services/audit



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romaix.ai · info@romaix.ai