

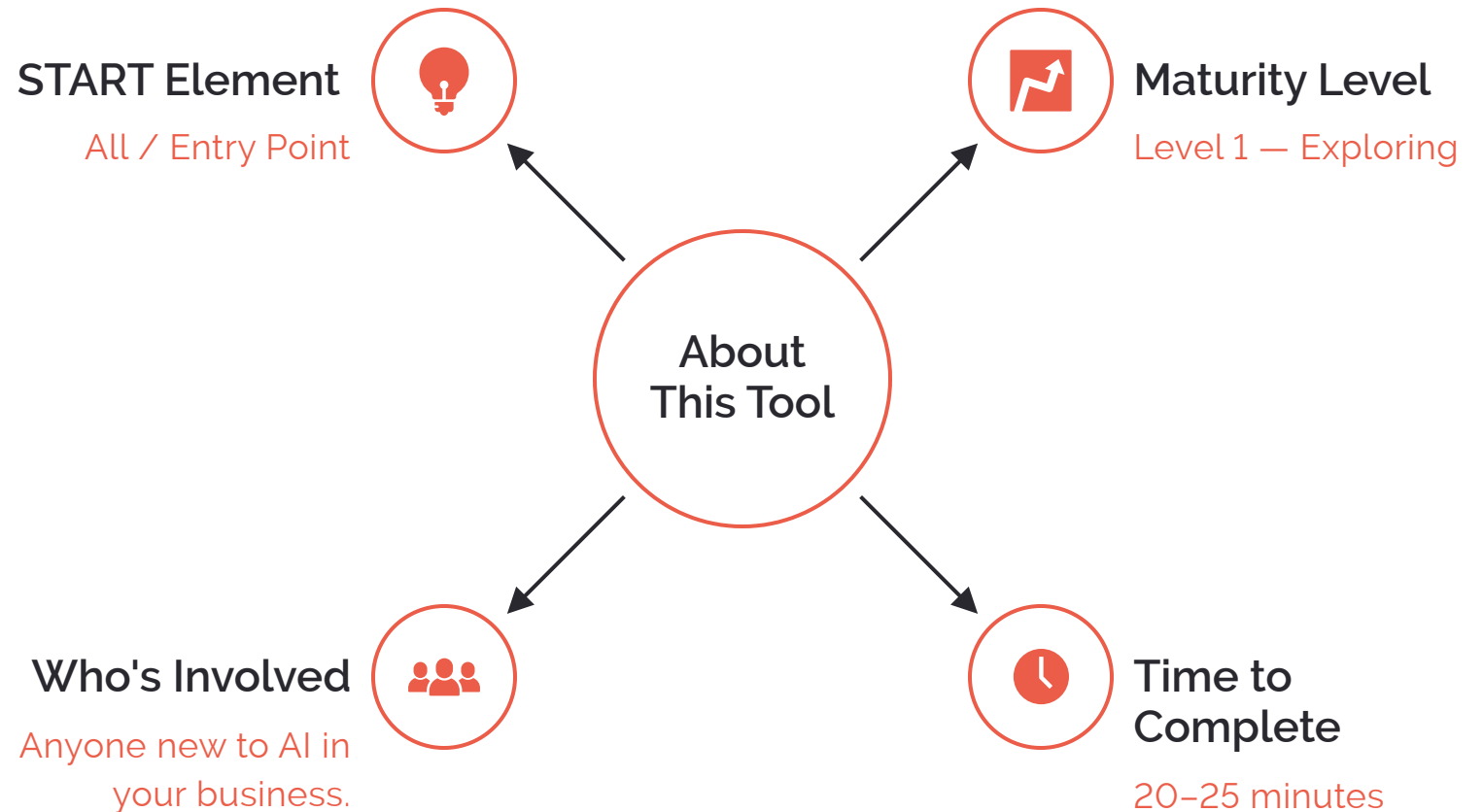
AI Basics Primer

For business leaders who are completely new to AI — and want a clear, practical starting point.



The AI Basics Primer

Your first steps with AI — practically explained.



A draft AI vision your team has genuinely agreed on — a working reference point for every AI decision that follows.

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What is the AI Primer?

A practical guide for people completely new to AI. Not theory — doing. If you're already using Gen AI regularly, the Vision Canvas or Readiness Assessment may be a better next step.



Why Use it?

Most people try AI once, get a poor result, and give up. This guide shows you why — and how to avoid this happening for you.



Benefits

The confidence and practical foundation to use AI tools effectively from day one.

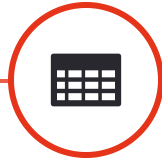
The AI Landscape

Explore the different types of AI and where to begin.



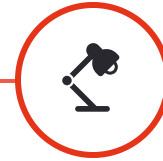
Generative AI

Creates content like text, images, and code. This is the recommended starting point for most small and medium-sized enterprises.



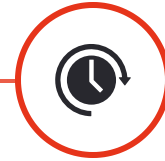
Machine Learning

Learns from data to identify patterns, used in applications like fraud detection and spam filtering.



Automation

Completes tasks without manual intervention, with AI enhancing capabilities in areas like scheduling and data entry.



Agentic AI

Acts on your behalf to perform tasks. Considered the next wave of AI development.

For your first steps, focus on Generative AI. Everything else builds from there.

Why Start with Generative AI?

It's accessible, immediately useful, and the right foundation.



No Setup Required

Browser-based, free tier available, and works in plain English. Get value today without needing IT, a budget, or technical knowledge.



Maps to What You Already Do

Supports tasks like writing, summarizing, researching, and drafting – activities performed daily by every SME.



Builds the Right Habits

Learn to work with Gen AI first. More advanced tools like agents, automation, and custom models can follow later.

Machine learning, agentic AI, and custom models all have their place. That place is not here — yet.

The Right Mindset

Treat AI like a capable colleague — not a magic answer machine.



- **Give it clear instructions**

Vague requests lead to vague outputs. Provide context for better results.

- **Expect mistakes**

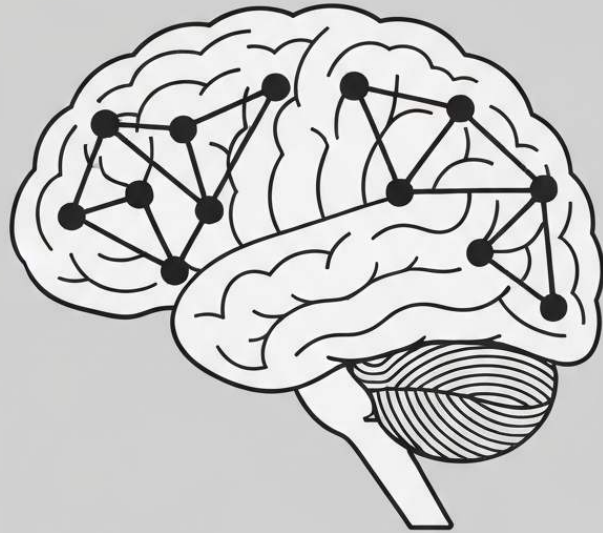
AI is not perfect. Always review its output; your judgment is crucial.

- **You get better as you use it**

Prompting is a skill that improves with practice. Keep experimenting.

Treat AI like a capable colleague — not a magic answer machine.

Before You Dive In



- **Check Existing Subscriptions**

Microsoft 365 and Google Workspace often include Gen AI features, so verify before purchasing new subscriptions.

- **Adapt to Rapid Changes**

The AI landscape evolves quickly. Be prepared to adjust your tools, features, and pricing strategies regularly.

- **Plan Team Deployment**

Strategize on task assignments, prompting standards, and guardrails before rolling out AI tools to your team.

- **Avoid Time-Cost Pitfalls**

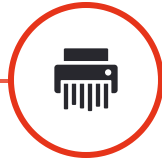
Ensure AI tools save time. If fine-tuning or setup takes longer than manual execution, reconsider the AI solution.

Security and Privacy



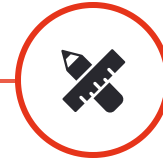
Public vs. Enterprise Tools

Free tools may train on your inputs, while enterprise versions offer stronger protections. Know which you are using.



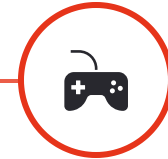
Never Input Sensitive Data

Avoid inputting client data, financial records, HR information, or passwords. When in doubt, leave it out.



Team Rules

Clear guidelines are necessary to prevent employees from inadvertently exposing sensitive information.



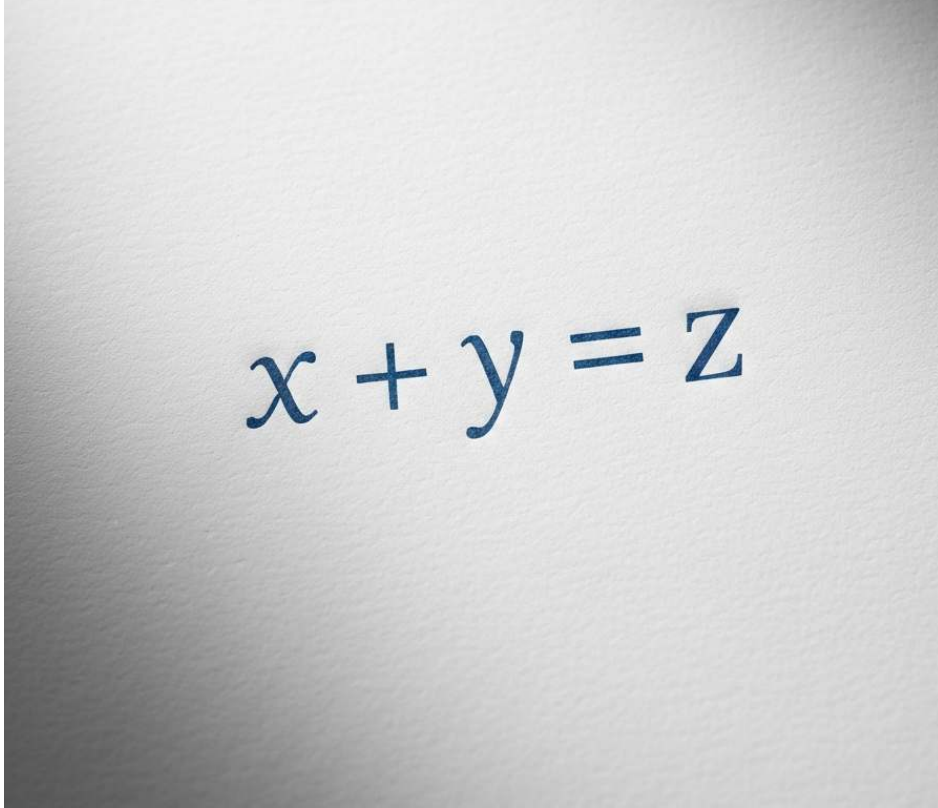
Regulated Industries

Finance, healthcare, and legal sectors must seek compliance advice before using AI in client-facing processes.

Security isn't a reason not to use AI. It's a reason to use it thoughtfully.

A Prompt That Works.

Task + Context + Format + Tone = Success



- **Task**

Clearly define what you want the AI to accomplish. Be precise in your instructions.

- **Context**

Provide necessary background information. Consider the audience and what the AI needs to understand.

- **Format**

Specify the desired output structure, such as a list, paragraph, table, or email.

- **Tone**

Describe the desired tone, whether it's professional, conversational, concise, or something else.

Weak output often stems from a weak prompt, not a deficient tool. Refine and retry your prompt.

See the Difference: Prompt Engineering

Weak vs. Strong Prompts

- | | | |
|---|---|--|
| <p>1 Weak Prompt (✗)
Writing: Write a follow-up email to a client.</p> | <p>3 Weak Prompt (✗)
Summarising: Summarise this document.</p> | <p>5 Weak Prompt (✗)
Brainstorming: Give me marketing ideas.</p> |
| <p>2 Strong Prompt (✓)
Writing: Write a 150-word follow-up email. Warm but professional. Clear next step included.</p> | <p>4 Strong Prompt (✓)
Summarising: Summarise in 5 bullet points. Key findings only. Non-technical audience.</p> | <p>6 Strong Prompt (✓)
Brainstorming: 5 LinkedIn post ideas for SME leaders in Canada. Practical not promotional.</p> |

Task. Context. Format. Tone. Every time.

Evaluating a Gen AI Tool

Four questions before you commit.



Does it do what I need?

Test on a real business task—
not a generic example.



What happens to my data?

Read the privacy policy.
Understand data storage and
usage.



What does it cost?

Start free. Only upgrade once
you've proven real value.



Will my team actually use it?

Consider ease of use and
integration. The best tool is
the one that gets used.

Mistakes to Avoid

The five most common first-timer mistakes.



- 1 Too many tools at once**
Pick one. Get good at it. Then expand.
- 2 Giving up after one bad result**
Refine the prompt first.
- 3 Treating output as finished work**
AI writes first drafts. You write the final version.
- 4 Sensitive data in public tools**
Never. If in doubt — leave it out.
- 5 Keeping it to yourself**
Share what works. Build a team prompt library.

Building the Habit

Consistency beats intensity.



- **One task. Every week.**

Pick something repetitive and use AI for it every single time for four weeks.

- **Track what works.**

Log your best prompts. Your prompt library compounds over time.

- **Share what you learn.**

One team session sharing what works beats a week of solo experimentation.

The goal isn't to master AI. It's to make it useful — one task at a time.

Ready to go deeper?



Set your direction

AI Vision Starter Canvas — align your team on where AI fits before going further.



Know where you stand

AI Readiness Assessment — 25 questions. Your honest baseline.



Get the team on board

Getting Your Team on Board — practical change management for AI adoption.

Start Smart. Stay Strategic.

The Strategic Mind

— START SMART. STAY STRATEGIC —