inpharmativ

A PRACTICAL GUIDE FOR BUSINESS OWNERS

You're Not Behind.

The calm, practical way to start using AI in your business without the hype, the overwhelm, or a single tool you don't need.

THE WHOLE IDEA, IN ONE LINE

You don't need more tools. You need one right starting point that fits how you already work.

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THE REAL PROBLEM

01

It’s not that you’re behind. It’s that AI has been over-sold and over-complicated.

There’s a new tool every week, a breathless headline every morning, and a steady hum of people implying you should already have this figured out. So most owners do one of two things: nothing, or a little dabbling that never quite sticks. Underneath both is the same quiet worry - **if I don’t get this, will we get left behind?**

That worry is real, and it’s everywhere. The owner in their sixties still doing handshake deals out of a paper planner. The manager who isn’t sure AI actually helps her job. The team where a couple of people use it and most don’t. None of them are lazy or behind the curve. They’re just standing in front of a wall of noise with no clear door.

Here’s the part almost no one selling AI will tell you: **you are not late, and you do not need to turn into a tech company.** The businesses that win with AI this decade won’t be the ones with the most tools or the biggest budgets. They’ll be the ones who picked one real problem and solved it well - then did it again.

This guide is short on purpose. No jargon. No 40-tool roundup. Just a clear way to see where you stand today and where to start - so the next step feels obvious instead of overwhelming.

WHAT AI ACTUALLY IS

02

AI is bigger than ChatGPT - and simpler than it sounds.

Most people think “AI” means typing into ChatGPT and hoping for something useful. That’s one doorway - and the smallest one. In a real business, AI tends to show up in three practical ways.

1

A smarter assistant for everyday work

Drafting, summarizing, researching, prepping - the repetitive thinking that quietly eats your team’s day. This is where most people start, and where a few licences plus real training pay off fast.

2

A way to finally use the data you already have

Most businesses sit on years of sales history, customer records, and notes they can’t actually ask questions of. AI can turn that into plain answers: what’s growing, what’s slipping, who to call.

3

A small custom “brain” built for one job

The highest-value work usually isn’t a tool you buy. It’s something built around how your business runs - a central place that pulls your data together, watches for what matters, and handles the repetitive part.

The good stuff is rarely off-the-shelf. It’s **bespoke** - built for your business, your data, and your one job that matters most. That’s exactly why it doesn’t have to be complicated. You’re solving one problem, not buying a platform.

WHERE YOU STAND

Where you are right now.

03

> **Forwarded this guide, or haven't taken the quiz yet?** Start with the free 60-second AI Literacy Check first - it pinpoints exactly where you stand, so the next steps are tailored to you instead of generic. **Take the 60-second quiz: inpharmativ.ca/ai-literacy-check**

Here's what your AI Literacy Check result means - and the one calm next step from wherever you landed. There's no wrong answer here. AI fluency isn't about being clever or technical. It's about comfort and habit.

1

AI Curious

You know AI matters, but you've barely touched it.

Next step: pick one small task and try AI on it three times this week. That's the whole assignment.

2

AI Dabbler

You use it now and then for simple things.

Next step: improve how you ask for things, and start sanity-checking what it gives back.

3

AI Capable

You get useful work out of it, but your habits are hit-or-miss.

Next step: take your best use and turn it into a repeatable step your team can follow.

4

AI Fluent

You use it regularly, verify it, and understand its limits.

Next step: write one workflow down and hand it to someone else to run.

5

AI Power User

You have repeatable workflows and help others improve.

Next step: decide what to standardize, govern, or properly build - and where a custom system would pay off.

Most owners and teams sit at level 1 or 2 - and that is a perfectly good place to start. The goal isn't to leap to the top. **It's to take the next step.**

THE ONE THING THAT MATTERS

Forget strategy. Pick your first problem.

04

You don’t need an AI strategy. You need a first win. The fastest way to find one is to stop thinking about tools and start looking at where your week leaks. Take any task that’s eating time and run it through three simple questions.

1

Does it happen often?

Weekly or more. Daily is even better - frequency is what makes the effort worth it.

2

Same kind of information each time?

If the inputs look similar every time, the steps can repeat - which means AI can help.

3

Low-risk if a human checks it?

No irreversible, regulated, or high-stakes calls. A person reviews before it counts.

Three yeses? That’s your first AI workflow.

Start there - one task, done well - before you touch anything else. One solved problem teaches you more than ten tools ever will.

> **What to ignore:** the pressure to “adopt AI” across the whole company, the 30-tool comparison spreadsheet, and the urge to automate everything at once. Simple and narrow beats broad and impressive - every single time.

WHAT IT LOOKS LIKE

05

What happens when you start with one thing.

A few real examples. None of these businesses overhauled anything. They picked one problem and built one fitted solution. (Clients de-identified.)

THE DATA YOU ALREADY HAVE

The problem: Six years of sales history trapped in a system that couldn't answer a single question.

What we built: One AI system that sorted 800+ accounts by what's growing, slipping, or gone quiet - refreshed automatically every quarter.

264

accounts (33%) had quietly stopped buying - and no one had noticed. The biggest: $67K a year.

MONEY SPENT BLIND

The problem: $20K+ a year on trade shows with no idea who'd be in the room or which shows paid off.

What we built: A system that scored 80 events down to the 11 worth attending, then profiled 985 attendees - each with a priority and a tailored opener.

80 → 11

The team worked the room by priority, not luck - walking in as the most prepared company there.

DIDN'T KNOW WHERE TO START

The problem: A business knew AI could help but had no idea where, across six departments.

What we built: A focused discovery - 20+ pain points scored on impact vs. effort, turned into a ranked roadmap.

$5–40K

per month: the value of the single starting build the discovery pinpointed.

> *"What has stood out most is their practical, business-focused approach to AI adoption. They don't simply provide theory and guidance - they create real tools and strategies built on our own data and internal systems."*
>
> - SENIOR EXECUTIVE, INDUSTRIAL EQUIPMENT MANUFACTURER (CANADA)

Also built: 800 accounts sorted into 6 sales segments with a playbook for each · 10,860 physicians billing-validated for a medtech launch · an AI-assisted diligence workflow for a closing acquisition.

WHERE TO START

06

A few simple places to start this month.

If the three questions pointed you somewhere, follow that. If you want a running start, here are calm, low-risk places most teams find a quick win. Don’t do all of them. Pick one.

- Turn messy meeting notes into clear next steps with owners attached.
- Summarize a long document or report into the three decisions it’s actually asking for.
- Draft a first-pass proposal or quote outline that you then refine - instead of starting from a blank page.
- Build a quick research brief on a customer or prospect before a call or meeting.
- Rewrite technical or internal information in plain language a customer will understand.
- Turn a recurring process that lives in someone’s head into a written checklist.

Notice the pattern: **prepare, organize, summarize, draft.** AI does the first 80% - your people keep the judgment and the final word. That’s the whole game at the start.

THE GUARDRAILS

A few simple rules to stay safe.

07

You don’t need a policy binder. You need a handful of habits - especially if you handle customer, patient, employee, or financial information.

Do

- ✓ Use AI to prepare, organize, summarize, and pressure-test your thinking.
- ✓ Check anything important before it goes out the door or drives a decision.
- ✓ Keep a person responsible for the final call - always.
- ✓ Start with public information or internal documents you’ve approved.

Don’t

- ✗ Paste confidential client, patient, employee, or financial records into public AI tools.
- ✗ Trust an answer on something that matters without verifying it first.
- ✗ Let AI make the final legal, medical, financial, or HR decision.
- ✗ Ask AI to create regulated or compliance claims without expert review.

The rule of thumb: let AI do the heavy lifting - keep humans on the judgment.

YOUR NEXT STEP

Take one step, not ten.

08

Wherever you landed on the AI Literacy Check, the move is the same shape - small, specific, and this week.

Curious / Dabbler	Pick one task from the A few simple places to start section and try it this week.
Capable / Fluent	Turn your best AI use into a written workflow your team can run.
Power User	Decide what's worth standardizing, governing, or building properly.

Want help finding your one starting point?

Book 30 minutes with me. We'll look at how your team actually works, which tasks eat the week, and the one or two places AI could help, whether or not you ever hire me.

> Bring one job your team does every week. We'll work out whether AI can take it on inside your rules, with the tools you already have.

Book your 30 minutes →

30 minutes · leave with a first step.

tidycal.com/inpharmativ/30-minute-meeting

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