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The 30-Day AI Rollout Plan for business owners



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Making AI easy and profitable for business owners

Plenty of business owners have tried AI. Far fewer have made it part of how the business runs.

The Dun & Bradstreet Business Expectations Outlook 2026, a survey of 210 Indian MSME leaders, found that 76% use AI, but only 5% have made it core to their operations. The gap is not the tools. The gap is a plan.

This is that plan. Thirty days, one small task a day. Each task is short enough to finish in one sitting, before the shop opens or after the last dispatch. By the end of the month you can have AI doing real, checked work in sales, operations and team training, and a clear view of what to keep.

How this plan works

- **One task a day.** Tick it off. If you miss a day, do it the next day. Do not try to catch up on three at once.
- **Use any general AI assistant.** ChatGPT, Claude and Gemini all have free tiers. Pick one and stay with it for the month.
- **Fill in the [brackets].** Every prompt here is copy-paste ready. Replace the parts in square brackets with your details. Only [square brackets] are for you to fill in. Words in <>, such as <>, are labels for the AI to use, so leave them as they are.
- **Keep one notebook or one note on your phone.** Call it "AI log". Every day, write one line: what you did, and whether it helped.
- **Two rules apply every single day:** remove customer personal data before you paste anything, and a human checks before anything goes to a customer.

The four weeks build on each other:

Week	Focus	By the end of the week you will have
1	Safe use, and hand AI 5 jobs	Your own rules, your tool set up, five saved prompts
2	Sales and follow-ups	An enquiry-to-quote flow and a follow-up system
3	Operations and SOPs	Two written SOPs, a daily report, a meeting routine
4	Team training and review	Trained staff, a team rulebook and an honest scorecard

Week 1: Safe use, and hand AI five jobs

The goal this week is not to do anything clever. It is to use AI safely and to make it a daily habit.

- [ ] **Day 1: Pick one AI assistant and set it up.** Create an account on ChatGPT, Claude or Gemini. Look through the settings. Where the tool lets you choose whether your chats are used to train its models, consider setting it so they are not. Install the app on your phone too.
- [ ] **Day 2: Write your "never paste" list.** On one page, list what must never go into an AI tool: customer phone numbers and addresses, bank details, passwords, GST and PAN numbers, unreleased financials, supplier contracts, employee personal data and salaries. Stick it near your desk.
- [ ] **Day 3: Learn the five-part prompt.** Every good prompt has a role, context, task, format and an example. Try it once on a real message you need to send today.

```
You are [role, for example "a senior sales executive at a jewellery wholesaler"].
Context: [the situation in 2 to 3 lines].
Task: [exactly what you want written or done].
Format: [for example "WhatsApp message, under 60 words, no emojis"].
Here is an example of my usual tone: "[paste a past message you liked]".
```

- [ ] **Day 4: Job 1, first drafts.** Pick one thing you write every week (a price update, a catalogue message, a notice to staff). Ask AI for the first draft. Edit it. Note how much you changed.

```
Write a first draft of [document or message] for [audience].
Key points to include: [list].
Tone: [simple / formal / warm]. Length: [short / one page].
Use only the facts I have given. Mark anything you are unsure about with
<<CHECK>>.
```

- [ ] **Day 5: Jobs 2 and 3, replies and summaries.** Take a long email, a supplier circular or a long WhatsApp thread (with personal details removed) and ask for a summary and a reply.

```
Here is a message I received, with names and numbers removed: "[paste]".
1. Summarise it in 3 bullet points.
2. List anything I need to decide or do.
3. Draft a short reply that [accepts / declines / asks for more time / asks these
questions: ...].
```

- [ ] **Day 6: Job 4, translation, and Job 5, checking.** Use AI to translate your reply to one customer into the language they wrote in, then translate it back into English to check the meaning has not changed. Then paste one of your own drafts and ask it to check for mistakes.

```
Check this [message / quote / notice] for spelling mistakes, unclear sentences,
wrong tone and anything that might confuse a customer. Do not rewrite it fully.
List the problems, then give me a corrected version.
"[paste draft]"
```

- [ ] **Day 7: Save your five jobs.** Write down the five jobs you will hand AI from now on: first drafts, replies, summaries, translations, checking. Save your best filled-in prompt for each in your "AI log". Review the week: which job helped most?

Week 2: Sales and follow-ups

Communication is the top use of AI in a CII–ISB study of 2,919 MSMEs (2026): 34.9% use it for communication. This week you turn that into a system for enquiries and follow-ups.

- [ ] **Day 8: Map your enquiry flow.** Write down, step by step, what happens today from the moment an enquiry comes in on WhatsApp, Instagram, phone or a marketplace to the moment a quote is sent. Circle the step that takes the longest or gets forgotten most.
- [ ] **Day 9: Build your first-reply prompt.** Create a reply template for new enquiries that answers what you can and asks only the questions you need.

```
You are a helpful sales executive at [business name], which sells [products] to
[customers].
New enquiry: "[paste, personal details removed]".
Our basics: [minimum order, delivery areas, usual dispatch time].
Write a WhatsApp reply under 80 words that thanks them, answers what we can, asks
no more than 3 questions we need before quoting, and ends with one next step. No
emojis.
```

- [ ] **Day 10: Build your quote prompt.** Use it on one real enquiry. Check every price, tax and total against your own price list before sending.

```
You are the sales manager at [business name].
Customer requirements: [items, quantities, delivery city].
Relevant prices from our list: [item, unit price, GST rate].
Draft a quote as a table: item, quantity, unit price, line total, GST, grand
total. Add delivery terms [terms], payment terms [terms], and validity until
[date].
Show your working. Do not invent any prices or terms.
```

- ☐ **Day 11: List every open quote.** In Excel or Google Sheets, list every quote or catalogue sent in recent weeks that has had no reply. Columns: customer (initials or code only), what was sent, date sent, stage, next follow-up date.
- ☐ **Day 12: Write your three-stage follow-up messages.** Create one set of messages you can reuse for every open quote.

```
I sent [a quote / catalogue / samples] for [product] to [type of customer]. No
reply yet.
Write 3 follow-ups:
1. a gentle check-in
2. a useful nudge that adds something new, such as a new design, a stock update
or a deadline for [festival or season]
3. a polite final message that makes it easy to say "not now"
Each under 50 words, WhatsApp style, no emojis, no pressure. Each ends with one
simple question.
```

- ☐ **Day 13: Send today's follow-ups.** Using your sheet and your three messages, personalise and send every follow-up due today. Read each one before sending. Set a phone or calendar reminder for the next round.
- ☐ **Day 14: Learn from a lost deal.** Pick one order you lost recently. Paste the conversation (personal details removed) and ask AI what may have gone wrong.

```
Here is a sales conversation that did not end in an order, with names removed: "
[paste]".
Act as an experienced sales coach. Tell me:
1. where the customer's interest seemed to drop
2. what questions we should have asked but did not
3. what we could have offered differently
4. one change to make in our next similar conversation
Be honest and specific.
```

Week 3: Operations and SOPs

Sales gets attention because it is visible. Operations is where knowledge quietly lives in one person's head. This week you start getting it on paper.

- [ ] **Day 15: Pick two processes to document.** Choose two jobs that only one or two people know how to do well. Examples: packing and dispatch, quality check, order entry in Tally, marketplace returns, showroom opening.
- [ ] **Day 16: Record the expert.** Ask the person who does the first process best if you can record them, then have them explain it out loud while you record a voice note. Ask them about the mistakes new people make. Transcribe it with your phone or AI tool.
- [ ] **Day 17: Turn it into an SOP.** Paste the transcript and create the written procedure. Then show it to the expert and ask, "What is missing?"

```
Below is a spoken explanation of how we do [process], with names removed. [paste transcript]
Turn it into a clear SOP: purpose, who does it, what they need before starting, numbered steps (one action each), common mistakes, and a short printable checklist.
Use simple English a new staff member can follow. List any unclear or missing steps as questions at the end. Do not guess.
```

- [ ] **Day 18: Do the second SOP.** Repeat Days 16 and 17 for your second process. Print both checklists and put them where the work happens.
- [ ] **Day 19: Set up a daily report.** Take today's sales, dispatch or stock sheet. Remove customer names and numbers. Ask AI to turn it into a short owner's report. Check the totals in Excel.

```
Here is today's [sales / dispatch / stock] data, copied from Excel with customer details removed: [paste].
Write a short report for me: total for the day, top 3 items or locations, anything unusual, and one question to ask my team tomorrow.
Show your calculations so I can check them. Flag any data that looks incomplete.
```

- [ ] **Day 20: Make meetings end with an action list.** After your next team or supplier meeting, paste your rough notes and get a clean action list to share.

```
Here are my notes from a meeting about [topic], with names replaced by roles:
[paste].
Give me: a 5-point summary, decisions made, an action table (action, owner role,
due date), and open questions. Then write a short WhatsApp message to the team
with the action list.
```

- [ ] **Day 21: Find one slow-moving item.** Paste your stock list with last sale dates and ask AI to sort by value of stock not moving. Check the numbers in Excel, then pick one item to act on.

```
Here is our stock list: item, quantity, date of last sale, units sold in the last
[90] days, cost per unit. [paste]
List items with no or low sales, sorted by value held (quantity x cost), showing
the calculation. For the top 5, suggest practical ways to move them: bundles,
retailer schemes, festive offers, or stop reordering.
```

Week 4: Team training and review

The Dun & Bradstreet Business Expectations Outlook 2026 found that 70.8% of the MSME leaders surveyed say training would speed up AI adoption, and that only 17% have guardrails in place. This week you do both, then judge the month honestly.

- [ ] **Day 22: Write your team's AI rules.** Use the free "AI Rules for Your Team" guide (comment RULES on any @bapnadigital post) or ask AI to draft a one-page policy from your Day 2 list. Cover: approved tools, what never to paste, human check before anything goes to customers, AI images and disclosure, who owns AI decisions, and what to do when AI gets it wrong.
- [ ] **Day 23: Pick your first AI champions.** Choose two or three staff who are curious and careful. One from sales or customer service, one from operations or accounts if possible.
- [ ] **Day 24: Training session 1, safe use.** Sit with your champions. Walk through the rules, the never-paste list and the five-part prompt. Have each of them write one real message with AI while you watch.
- [ ] **Day 25: Training session 2, their own task.** Ask each champion to name the most repetitive writing task in their job. Help them build one prompt for it and save it.

```
I work as a [role] at a [type of business]. Every day I have to [describe the repetitive task].
Help me write one reusable prompt I can use for this task. It should have spaces in [square brackets] for the details that change each time.
Then show me an example of the prompt filled in and the answer it would give.
```

- ☐ **Day 26: Build a shared prompt library.** Create one shared document or WhatsApp group note called "Approved prompts". Add your five jobs from Week 1, your sales prompts from Week 2, and each champion's prompt. One line each on when to use it.
- ☐ **Day 27: Set up a simple FAQ answer sheet.** List the questions customers ask your team most often, with the answers your team gives today. Ask AI to turn them into approved, consistent answers your staff can copy.

```
Here are questions our customers ask often, with my team's rough answers: [paste 10 to 20].
Write a clear, friendly answer under 50 words for each, keeping every fact exactly as given. Flag any answers that are unclear or contradict each other.
Format as a table: question, approved answer, notes.
```

- ☐ **Day 28: Share wins.** Hold a short team huddle. Each champion shows one thing AI helped them do this month and one thing it got wrong. Note both in the AI log.
- ☐ **Day 29: Fill in the scorecard.** Use the scorecard on the next page. Be honest. A "no" is useful information.
- ☐ **Day 30: Decide what is next.** Using the scorecard, choose what to keep, what to fix and what to drop. Then pick the one area you will go deeper on next month.

```
Here is my scorecard after 30 days of using AI in my business: [paste your scorecard answers and notes].
Act as a practical business advisor.
1. Tell me which 3 uses I should keep and make standard.
2. Tell me which uses to drop or fix, and why.
3. Suggest one area to go deeper on next month, with 4 weekly steps.
Be direct and specific to what I have written. Do not suggest anything that needs a developer.
```

The 30-Day Scorecard

Fill this in on Day 29. Score each line from 1 (did not help) to 5 (now part of how we work). Use your AI log to answer honestly.

Part 1: What did we actually use?

Area	What we tried	Used it more than once a week? (Y/N)	Score 1–5	Keep, fix or drop?
First drafts				
Replies and summaries				
Translation				
Checking our writing				
Enquiry first replies				
Quotes				
Follow-up system				
SOPs				
Daily report				
Meeting action lists				
Stock review				
FAQ answer sheet				
Team prompts				

Part 2: Did it help the business?

Answer each in one line, from what you saw, not what you hoped.

1. Which task now gets done faster than before?
2. Which open quotes got a reply because of the follow-up system?

3. Which process is no longer stuck in one person's head?
4. Which staff member now uses AI on their own, safely?
5. Where did AI get something wrong, and did our human check catch it?

Part 3: Are we using it safely?

Check	Yes / No
Everyone knows the never-paste list	
Only approved tools are being used	
Every customer-facing message is checked by a person first	
AI rules are written down and shared	
One person owns AI decisions in the business	
Mistakes are being noted and shared, not hidden	

Part 4: Decisions for next month

- **Keep and make standard:** [three uses]
- **Fix:** [what needs a better prompt, better data or more training]
- **Drop:** [what did not help]
- **Go deeper on:** [one area]
- **Next person to train:** [role]

A short reminder: AI is not legal or tax advice. Keep a qualified professional involved in any legal, tax or compliance decision.

> **About Shubham**
>
> Shubham Bapna is a second-generation jeweller from Mumbai. He runs Shree Taru Jewels, a 45-year family jewellery manufacturing and export house that sells to retailers; NEWDRU, a D2C consumer electronics and lifestyle brand selling on Amazon, Flipkart, Blinkit and through an experience centre in Chembur; and Siyaara, a silver and gold-polished silver jewellery brand. He leads Jewellery Sahi Hai, a jewellery industry coalition, and is a GJEPC 40 Under 40 recipient.
>
> He is not a coder. Using AI tools, he has built AI model shots of real jewellery (a real model, with consent, digitally wearing real pieces), an AI-assisted video editing setup for

> his reels and scheduled social posting for several brands, and is building a website for Jain audio recordings, an order-booking app for gold and silver coins and a B2B jewellery catalogue and CRM app.

Follow @bapnadigital on Instagram and Shubham Bapna on LinkedIn for one practical AI system a week.