A PRACTICAL GUIDE FOR BUSINESS OWNERS

It's not too late.

Put AI to work in your business.
Start with one job you already know.



PAUL LINDSEY / SURVIVOR MOUNTAIN

Less repeated work. Clearer handoffs. A useful first step your team can actually use.

Salem, Oregon | October 2026 | Guide + editable toolkit

01 / CHOOSE THE WORK

Start with the job. Then choose the tool.

You do not need to rebuild the business to try one useful improvement.

Pick a familiar task with a clear start, a finished result and someone who can check it. Ask the person doing the job to show you an ordinary example and an awkward one.

Keep the first experiment reversible. Drafting a reply for review is a manageable starting point. Letting a tool send every reply needs a different level of control.



PAUL LINDSEY

Practical systems and AI help from Salem, Oregon.

1 — 2 — 3 — 4

Find it

One repeated job.

Map it

See the handoffs.

Try it

Keep a person checking.

Measure it

Keep, change or stop.

START HERE

The job begins when ____. It is finished when ____. The reviewer is ____.

02 / FIND THE REPETITION

Where are you doing it twice?

Watch a few ordinary working days. Look for copying, chasing, waiting and correcting before you buy another tool.



Orders

The same details get typed again after they have already arrived.



Quotes

A draft waits on job notes that only one person understands.



Follow-up

An enquiry arrives, but nobody owns the next action.



Procedures

The answer changes depending on who happens to be asked.

OBSERVE BEFORE ESTIMATING

Record how often it happens, the minutes used and the evidence behind the number. Include checking and corrections.

03 / MAP ONE HANDOFF

Follow one piece of work.

Fictional example: a technician finishes a fence inspection. Follow the notes all the way to the approved customer update.

01 **Job notes** — Technician — Record what was inspected and what was found.

02 **Check facts** — Office — Find missing information before drafting.

03 **Draft update** — Office + tool — Use only the confirmed notes.

04 **Approve** — Technician — Confirm the facts, price and any commitments.

05 **Send + record** — Office — Send the approved message. Name the next action.

Missing price or uncertain date? Pause and return to the person who can confirm it.

MAP THE EXCEPTION TOO

At each handoff: who owns it, where does the information live, what must be checked, and what happens if it is missing?

04 / CHOOSE THE APPROACH

Does it actually need AI?

Work down this ladder. Choose the simplest approach that lets the team complete the job and handle the exceptions.

01

Clearer process

Ownership or required information is unclear.
Name an owner. Improve the checklist.

02

Existing software

A feature you already pay for may handle it.
Try a saved template, form or notification.

03

Rule-based automation

The steps and conditions are predictable.
Define duplicates, failures and retries.

04

AI assistance

Drafting or organising needs judgement.
Bound the task. Have a person verify it.

USEFULNESS BEATS NOVELTY

A good demonstration is only a start. Your team needs a dependable way to do the ordinary work.

05 / SET BOUNDARIES

Decide what belongs inside the tool.

Start with made-up examples. Before using business information, agree the service, permissions, retention and account owner.

Pilot inputs

- Made-up examples
- Approved instructions
- Only the access needed
- A named person in charge

Keep out initially

- Customer records
- Passwords and credentials
- Sensitive commercial details
- Unapproved integrations

Before the next step

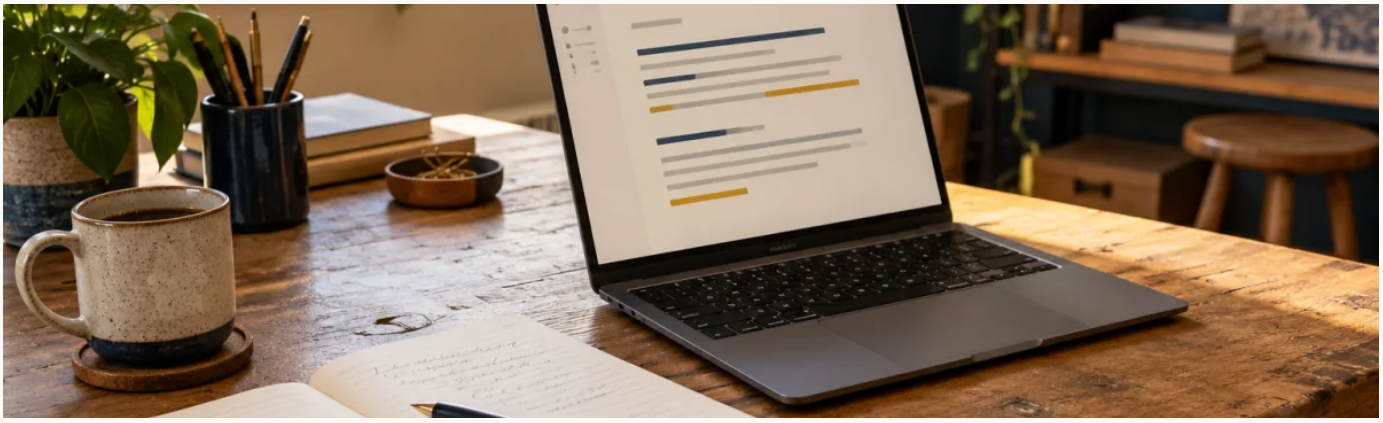
Who can invite users? Is information used for training? Can you export or delete it? Who can stop the pilot and revoke access? Check the chosen tool's current terms and settings.

MAKE THE BOUNDARY EXPLICIT

Local or cloud is only part of the decision. Base access on the information, permissions and support your business needs.

06 / WRITE THE BRIEF

Good notes.
A bounded draft. A human check.



AI-generated workspace illustration. The example below is fictional.

REUSABLE INSTRUCTION

Use only these notes to draft a short customer update. List missing information separately. Do not invent prices, dates or promises. Flag conflicts. Return a draft for review; do not send it.

SOURCE NOTES

Fence inspected.
Two posts need replacing.
Materials price not checked.
Return date not agreed.

DRAFT / NOT SENT

We inspected the fence and found two posts that need replacing.

Still to confirm:
Materials price and return date.

REVIEW AGAINST THE SOURCE

Confident wording is not proof. The reviewer checks the facts and resolves missing details before anything is sent.

07 / CHECK THE RESULT

Make review part of the workflow.

Name the reviewer. Check the result before it reaches a customer or changes an important record.

Source

Approved facts

→

Review

Named person

→

Accept

Record approval

CHECK EVERY FIRST-PILOT RESULT

- Names, quantities and facts match the source.
- Prices, dates and commitments are confirmed.
- Missing or conflicting details are resolved.
- The wording fits and the reviewer approves it.

TEST AWKWARD CASES

Missing information / Conflicting notes / Duplicate request
Failed connection: each should be flagged for a person.

KEEP THE STOP BUTTON

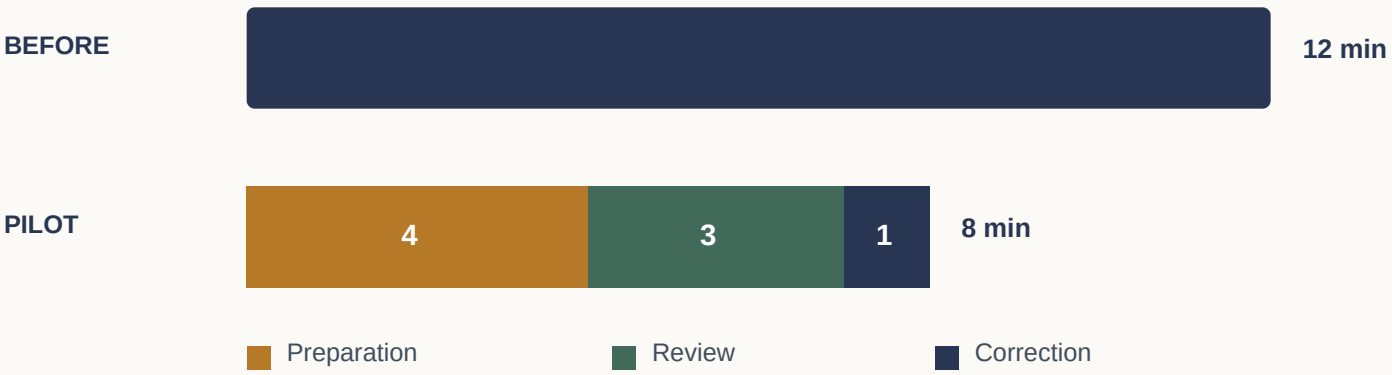
If checking takes longer than doing the task manually, narrow the task, improve the inputs or stop the pilot.

08 / MEASURE THE WHOLE JOB

Count the checking too.

Fictional arithmetic, not a customer result or savings promise. Measure the same completed task before and during a pilot.

MINUTES PER COMPLETED TASK



4 min
difference per task

x 20
tasks per week

= 80 min
in this example

Time released is not automatically cash saved. Include setup, subscriptions and support costs. Record whether each figure was measured or estimated, and whether the output was accepted.

DECIDE FROM EVIDENCE

Can the team use the time for something useful? Keep, change or stop based on the whole job, not the fastest demonstration.

09 / PICK THE FIRST PROJECT

Three practical options. One sensible first step.

Compare the result, DIY steps, effort, dependencies, costs and checks before choosing what to do.

01

Do it yourself

Improve the notes, ownership and checklist.

02

Small assisted workflow

Use approved notes to prepare a draft for review.

03

Larger change

Plan the integrations and access. Waiting is an option.

EXAMPLE FIRST SCOPE / FICTIONAL

- **Build:** A better note template and drafting instruction.
- **Test:** Ordinary and awkward made-up examples.
- **Hand over:** A checklist, project files and instructions.

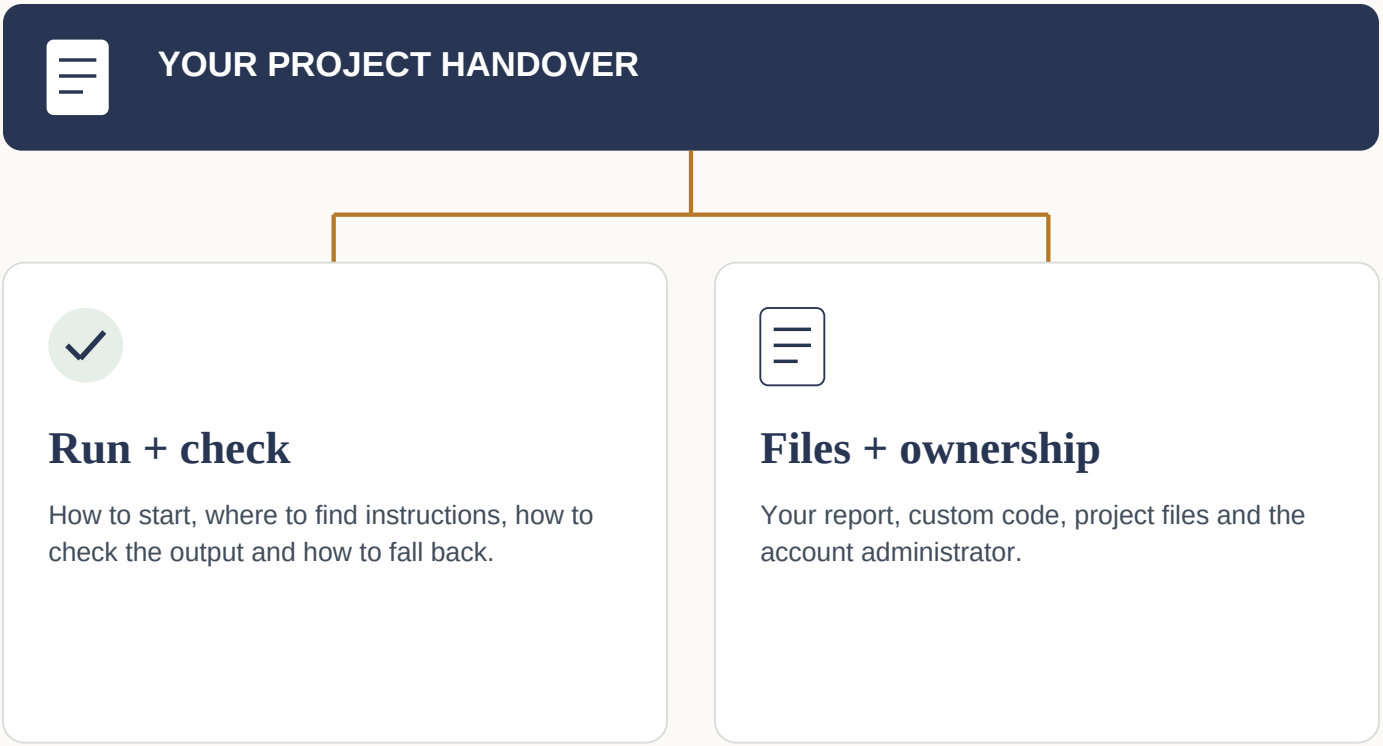
DEFINE THE EDGES

Five implementation hours include testing, instructions and handover. Agree a small scope; every integration will not fit.

10 / HAND IT OVER

Leave it usable by someone else.

Ask a colleague who did not build the improvement to follow the instructions. Update the places where they hesitate.



ALSO RECORD

Third-party tools, licence terms, subscriptions, backups, maintenance owner and review date. Store passwords in a password manager, never in the worksheet.

THE HANDOVER TEST

Can another team member run it, check it and recognise a failure without the builder standing beside them?

YOUR NEXT STEP

Bring one job.
We will start there.



Paul Lindsey / Salem, Oregon

YOUR BUSINESS, WORKING BETTER

$599

Introductory package

A practical review, three options and hands-on work on your chosen first project.

~2 hr	~2 hr	~1 hr	5 hr
On-site review	Report preparation	Walkthrough	Build, test + handover

Keep your report, documents and custom project code. We agree fit, your town, dates and a manageable scope before payment. Travel outside the agreed area, software and hosting are discussed separately. Third-party licences still apply.

Talk to Paul about your first project

survivormountain.com/ai-audit | 971-399-7621

Prefer DIY? Get the editable toolkit at survivormountain.com/youtube.