SESSION GUIDE 2
PROMPTING

SBDC LUNCHBREAK BY CATHY BALACH | JANUARY 2026

Getting Better Answers from AI

PLAN BEFORE YOU PROMPT

1. Provide Context & Background Clearly

Include what you want, who it's for, why you're doing it, and any restraints you want put on the results (e.g. length, style, deadline).

❌ **Too vague**: Write a social media post promoting Valentine's Day cookies.
✅ **Better**: Write a short, upbeat Instagram post for our bakery's Valentine's Day cookie special. Mention heart-shaped sugar cookies with pink sprinkles, $10/dozen, and available Friday–Sunday.
Tip: AI doesn't know what you want unless you tell it.

❌ **No context**: Make a flyer for our upcoming event, Smarter Marketing with AI.
✅ **Better**: Create a one-page flyer for a free AI workshop hosted by the Sonoma SBDC in partnership with the Santa Rosa Metro Chamber. It's for small businesses in Sonoma County and will be sent out to SBDC clients and partners. The event is 4 Wednesdays, Feb 4-25, 12pm via Zoom.

2. Specify Role & Perspective

Assign a role to the AI so it can tailor its response appropriately.

Example: You are a world-class HR consultant for small businesses. Write a clear, friendly employee dress code for a casual café with younger staff and no uniforms.

3. Define Format & Tone

Tell it exactly how you want the output (text, list, script, calendar, checklist) and what tone to use (friendly, professional, supportive, etc.).

Example: Write a short FAQ (friendly tone) about our 'Refer a Friend' program (using the attached details about the program) for our fitness studio Studio X. Use bullet points in the description. Max 150 words. Suggest a Call to Action.

STYLE & FORMAT TRICKS

4. Work in Steps, Not All at Once

You don't have to ask for the final version first. Get options, pick what you like, then move forward.

Example:
Step 1:
Suggest 5 taglines for a home-based dog grooming service. Keep them short, catchy, and friendly.

Step 2:
Based on tagline #3, write a short About Us section for the homepage. Keep it under 120 words, friendly and conversational, and mention that we specialize in senior dogs.

Step 3:
Now draft a Services section with a bullet list. Include: full grooming, nail trimming, flea baths, and de-shedding treatments. Mention that we come to the client's home and include pricing from $45 to $95.

5. Refer to Good Examples

Show AI how you write, then tell it to match that style.

Example: Write a welcome email in the style below. I want it short and friendly with a touch of humor.
[PASTE or UPLOAD your own example of past writing]

💡**Tip**: This is how you keep it sounding like you, not like "a brochure."

6. Refine and Revise Until It's Right

Don't settle for the first draft. You're allowed to tell it what to fix. In fact, you should.

Examples:

- This version sounds too formal. Rewrite it in a relaxed tone, under 75 words, like it's from a local business owner who knows their customers.
- Make this clearer. Shorter sentences. No medical jargon.

MAKE AI WORK HARDER

7. Ask for Multiple Options

One request can give you choices in tone, point of view, or approach. You're not stuck with one voice. You can test to find the best option for your needs.

Examples:

- Give me 3 versions of a short product description for our handmade beeswax candles: one poetic, one practical, and one playful.
- Suggest 5 subject lines I could use for an email reminder about our the Working with AI workshop series starting next Wednesday. Keep each one under 8 words.

8. Make AI Interview You

You can ask AI to interview you first (one question at a time), or ask clarifying questions before it gives you an answer. This prevents blank responses or missed details.

Examples:

- I am writing an About page for my website. Interview me and ask me questions ONE AT A TIME so you can help me write a great About page.
- I want to write a 1-page bio about my life. Ask me ONE QUESTION AT A TIME. When I say 'go,' I am finished and you can begin writing.

9. Put AI on the Spot

Ask AI to explain it's suggestions.

Example: Please review the attached marketing ideas for 2026 (upload attachment). Which of these ideas do you suggest for my business and why? Explain your reasoning.

10. Start with Your Goal When You're Stumped (using AI to help you use AI)

If you don't know how to ask, say what you're trying to do and let AI draft the prompt for you.

Example: I want a one-page checklist for new clients at my salon—but I'm not sure how to ask for it. Can you give me 3 ways to prompt you, and what kind of results I'd likely get from each?

DOUBLE CHECK RESULTS

11. Ask: "Where did you get this info?"

When it really matters—and the source isn't automatically shown—ask the AI to explain its reasoning or list where the information came from.

Examples:

- Help me decide: Should I advertise my dog grooming service on Facebook or Instagram? Give me 3 pros and cons for each, then tell me which you recommend and why—based on a small business with a limited budget and mostly local customers.
- After getting answers without clear sources: *Can you tell me your sources?*

12. Use More than One AI Tool

Use your back-up tools to compare results, putting the exact same prompt in AI tools side-by-side.

Adding Additional Details Fast

To get accurate, personalized, and helpful answers, you often need to **feed it information first**. Think of it like handing over background notes before asking for help.

1. Paste Text (Best for Quick Content)

Example: Here's the About Us section from my pet grooming website: [paste it in]. Using this, write a short welcome email to new clients. Make it friendly and under 150 words.

2. Upload Files (PDFs, Docs, Spreadsheets)

Many AI tools—like ChatGPT, Claude, or Gemini—let you upload files, which can be a huge time saver. This is especially useful for summarizing content, repurposing work you've already done, or reviewing long documents.

Examples:

- Please read the attached document (our April newsletter) and summarize the top 3 updates in a friendly, easy-to-read tone we can use for a Facebook post. [Attach newsletter]
- Attached is the updated draft of my Morning Opening Guidelines for the operations manual. Please go through this and identify any inconsistencies, potential contradictions with other parts of the manual, or areas that need improvement. [Upload draft]
- Rewrite this document in a more conversational tone for our website. (Upload document]

Tip: You can upload PDFs, Word docs, or even spreadsheets—just make sure the content is clear and organized.

3. Use Website Links in AI (Use with Caution)

Some AI tools with browsing (like ChatGPT, Gemini, Perplexity) can pull information from a web page—but it's not always reliable (depends on the website as well as the AI tool). **Always test it first.**

Note: Some AI versions can't always read pages on the web (e.g. they are blocked by the site or the AI tool is limited)

Testing Examples:

- Visit this link: [URL]. What's the headline at the top of the page?
- Pull details from this URL: [URL]. What is the event title and the date of the event listed?

If it gets that wrong, don't use it. If AI can see the website, you can use it as a shortcut.

Examples:

- Pull details about the event at [URL]. Rewrite a two-paragraph blurb about the event I can use for my upcoming email newsletter.
- Use this webpage as your source: [URL] - Create some short FAQs based on the services offered.

4. Use Images or Screenshots

Yes, you can drag in an image and ask for help!

Examples:

- Here's a photo of my booth. Any suggestions to improve my signage? Can you suggest a call to action?

- This is my actual menu—what would you improve?
- Please read the text in this image and give me a typed version I can copy and paste. Let me know if anything is blurry or hard to read.

5. Use Your Voice

Some AI tools now let you **talk instead of type**. This is great for:

- Thinking out loud
- Brainstorming while walking
- Prompting on the go

Example: I'm looking for fresh marketing ideas for my [describe business or situation]. Can you help me brainstorm 20 ideas?

6. Use Combinations

You can *combine inputs* for powerful results.

Example: [Upload image] Here's a product image of our shoes. Please write a product description based on the image. Make the style and tone match the product descriptions on our website: [Link to website]. Keep it short, energetic, and focused on comfort and style. Add a playful headline.

Using AI Safely: Cautions

1. Don't Share Sensitive Information

AI tools don't need private data to help you—and you shouldn't trust them with it.

❌ **Never enter:**

- Customer emails, addresses, or phone numbers
- Credit card or bank details
- Employee info (like Social Security numbers or medical info)
- Your business passwords or logins

2. Don't Rely Solely on AI When it Really Counts

AI might sound confident, but it can give outdated or flat-out wrong answers—especially on rules, laws, or local facts. If you're asking about taxes, licenses, contracts, hiring laws, or anything financial, **don't rely on AI alone.**

3. Be Specific about Dates

AI can and will provide outdated results at times. Is your information date-sensitive? If yes, you'll need to fact-check the data.

Examples:

- If you ask: *What's the deadline for filing my small business taxes?* — you might get a mix of outdated info.
  Instead ask: *What are the IRS small business tax deadlines for 2026? Can you tell me the web page that cites the deadlines?* (then do a double-check of the deadlines manually)
- You can also ask: 'Is this information current as of 2026? If you're uncertain or have contradictory information, please clarify.'