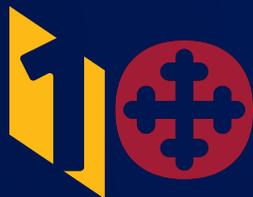


10TH ANNUAL
GOVERNOR'S
**SMALL BUSINESS
OUTREACH
SUMMIT**

AI Unleashed: Streamlining Your Business for Maximum Efficiency



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AI Unleashed: Streamlining Your Business for Maximum Efficiency

AGENDA

- I. Best Practices for Prompts
- II. AI Essentials
- III. Implementing AI
- IV. AI In Finance and Accounting
- V. AI in Operations and Supply Chain
- VI. AI In Marketing
- VII. AI Agents
- VIII. ROI & KPIs



Will Holmes

Founder of WHC

I am so happy to meet you! Scan this QR code to schedule our follow-up meeting!



whcusa.com/hello

Schedule a FREE AI CONSULTATION with Will Holmes!



Will Holmes

RECOGNIZED FOR COMMUNITY SERVICE AND ECONOMIC IMPACT BY:

The Governor of Maryland
The Comptroller of Maryland
The Maryland General Assembly
The Mayor's Office of the City of Baltimore
The Baltimore City Council
The Baltimore City Chamber of Commerce
United States Senator Chris Van Hollen
United States Senator Ben Cardin
Baltimore County Executive Kevin Kamenetz
The Mayor's Office of Employment Development
The University of Baltimore Merrick School of Business
The Greater Baltimore Leadership Association
Network for Teaching Entrepreneurship
Baltimore Urban Alliance
American Cancer Society
Johns Hopkins Carey Business School



Founder of WHC

Established in 2006 | Providing AI, Business Management, and Commercial Loans to Government Agencies, Banks, Universities, Economic Development Orgs, and Entrepreneurs



Entrepreneur in Residence, Johns Hopkins Carey Business School

Since 2019 | 150 Businesses | 180 MBAs



Chairman Emeritus, Baltimore City Chamber of Commerce

Elected 2019 | 400+ Members, representing 23,000 employees



Founder, Baltimore Economic Leadership League

Founded in December 2021, providing Micro Loans to small businesses across Maryland.



2024 SBA Maryland Business of the Year

Recognized for our work in the community and our economic impact on Maryland.



Author of "Find A Need. Fill A Need. Get Paid."

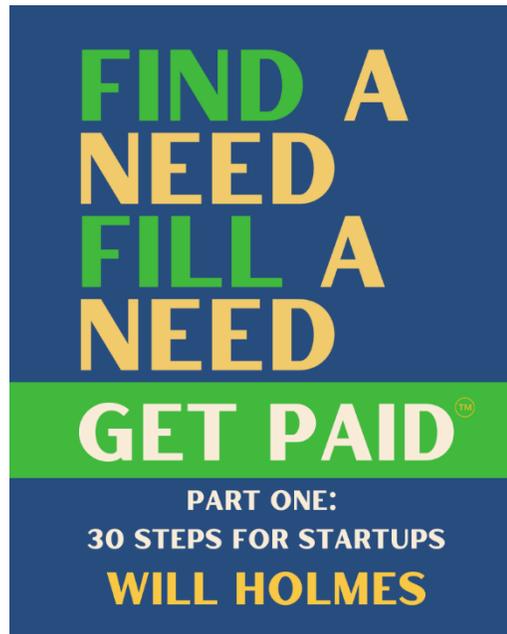
A 4-book series that is the foundation for WHC's Entrepreneurship Curriculum. Self-published in 2025.



Learn more about Will Holmes at <https://whcusa.com/will-holmes-founder-of-whc>

Let's create an ad for my book in Google Gemini

gemini.google.com



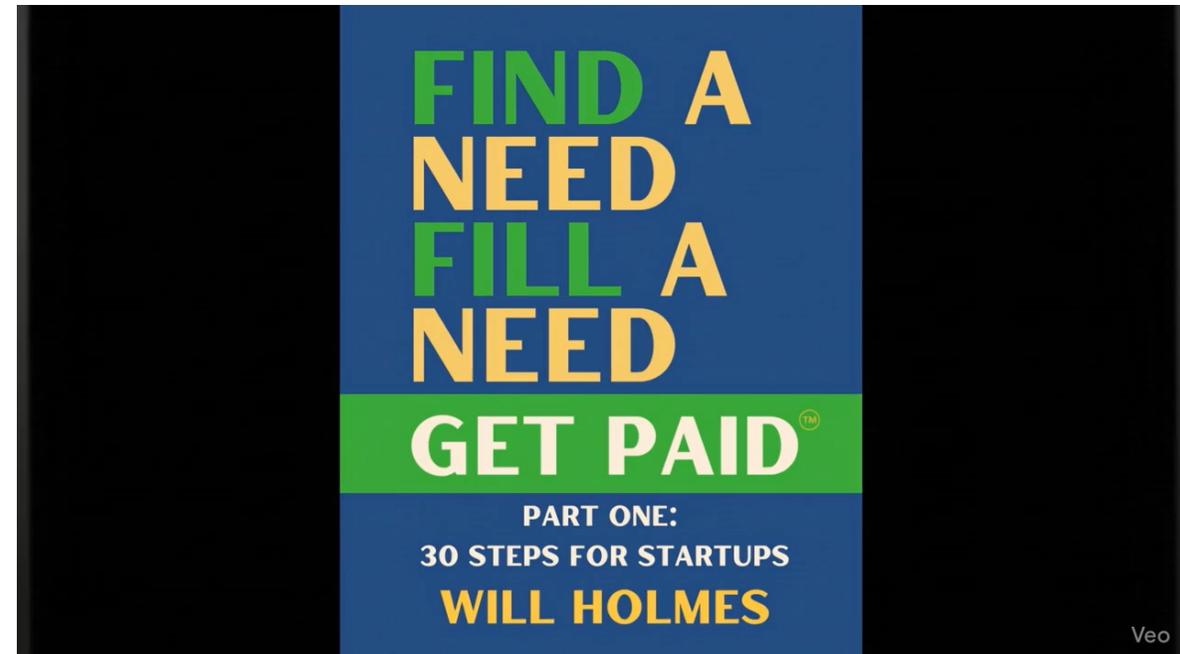
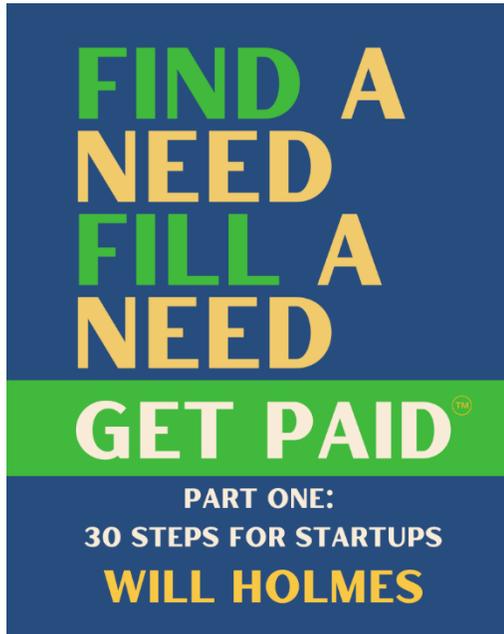
Prompt One: This image is my book cover for my book, Find A Need Fill a Need Get Paid. Please create an interesting ad to make people want to buy it.

Prompt Two: I have uploaded an image of a book cover. The name of the book is "Find a Need. Fill a Need Get Paid." The author's name is Will Holmes. Please create a video of a pretty woman with curly hair holding the book, then turning to the audience and happily recommending the book because it helped her improve her business. The woman is standing next to her red convertible sports car on a street in New York City. She is wearing a white blouse and white pants and white shoes. The background noise is traffic and chatter from people passing by. the lighting is sunny and bright. People passing by are wearing business suits. They all look at the care when they pass by. The look is hyper realistic.

Let's create an ad for my book in Google Gemini

gemini.google.com

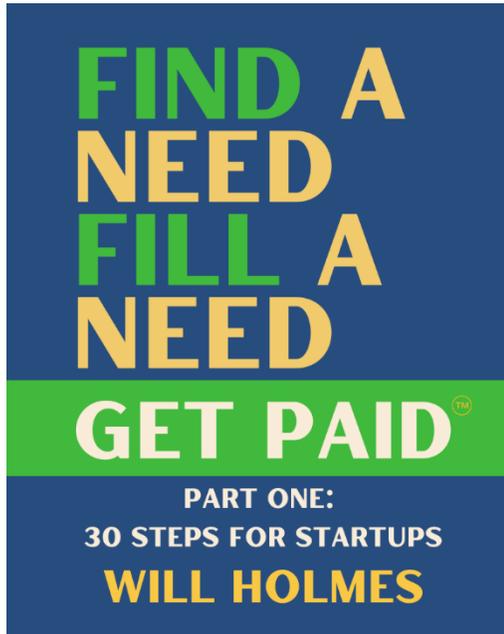
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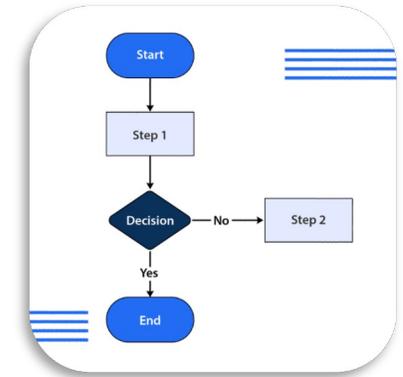


What is Artificial Intelligence?

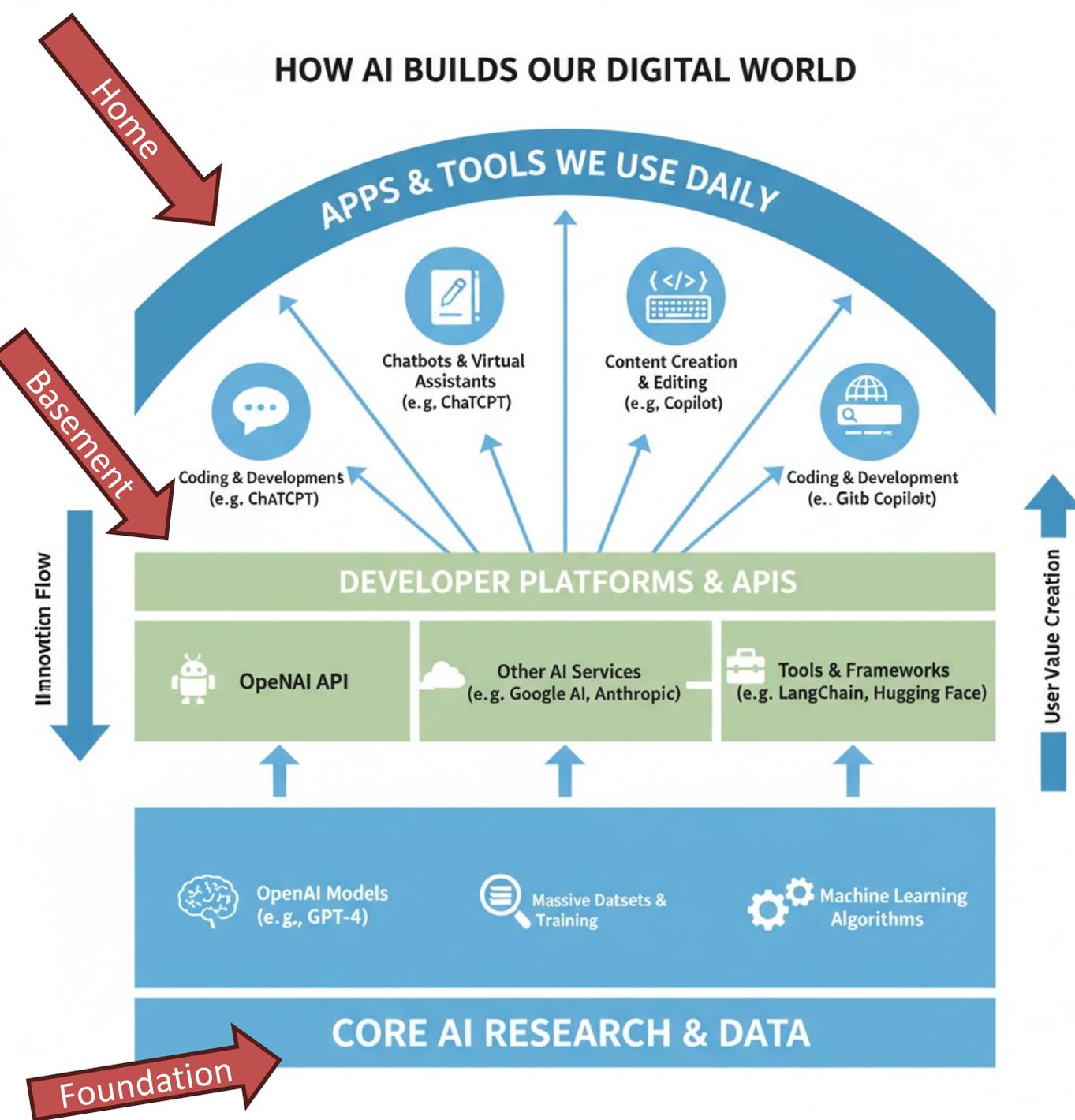
AI works by feeding vast amounts of data into algorithms that learn patterns and make predictions. These algorithms, often inspired by the human brain, enable machines to perform tasks like recognizing images, understanding language, and making decisions.

What are algorithms?

AI algorithms are like sets of rules that computers follow to learn and make decisions. They process huge amounts of data, finding patterns and connections. When you ask a question, the AI uses these patterns to generate a relevant and informative answer, often drawing from a vast database of information.



HOW AI BUILDS OUR DIGITAL WORLD

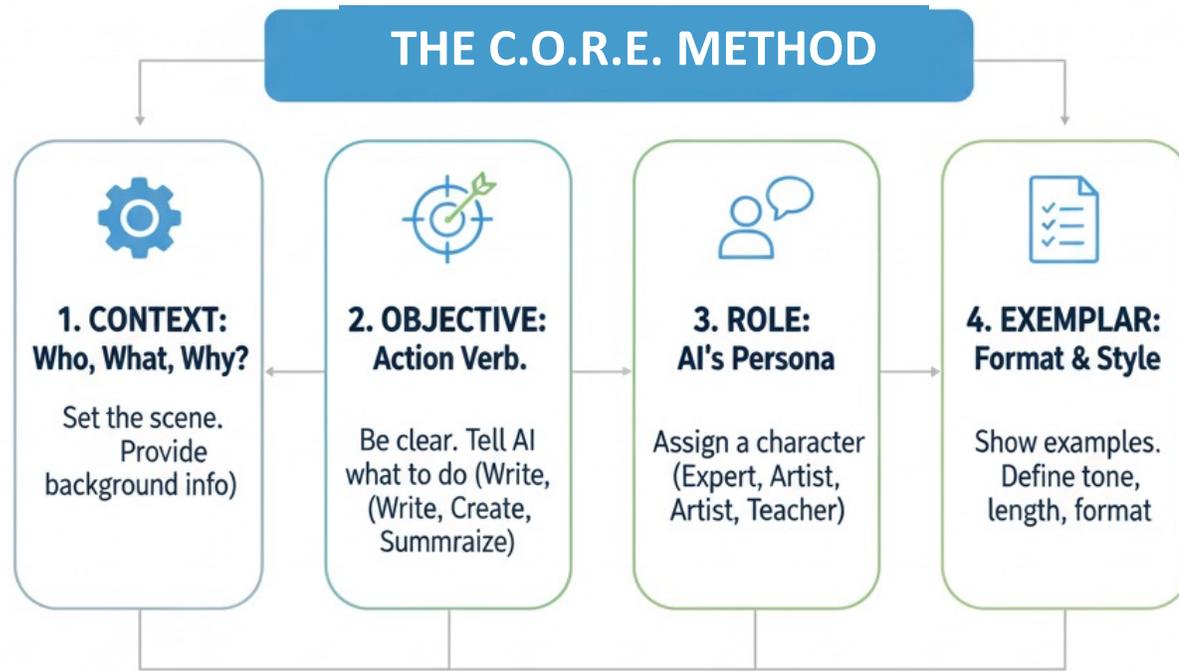


AI: A House Built on Data

- **Core Analogy:** Compares building an AI application to building a house.
- **The Three Layers:**
 - **Foundation:** Core AI Research & Data.
 - **Basement:** Developer Platforms (Google Vertex, Microsoft Azure, AWS) & APIs (Application Programming Interface rules for communication)
 - **Finished Home:** The final apps and tools you use.

Three logical layers: the deep foundation of research, the structural framework of developer tools, and the finished, usable application.

AI PROMPT ENGINEERING: BEST PRACTICES FOR GREAT RESULTS



GENERAL PRO TIPS



BE SPECIFIC:
Use descriptive language



ITERATE & REFINE:
Treat it as a conversation



USE CONSTRAINTS:
Define limits (e.g, word count, cunt, -no blurry^m).

The 4 Key Elements of a Great Prompt (The C.O.R.E. Method)

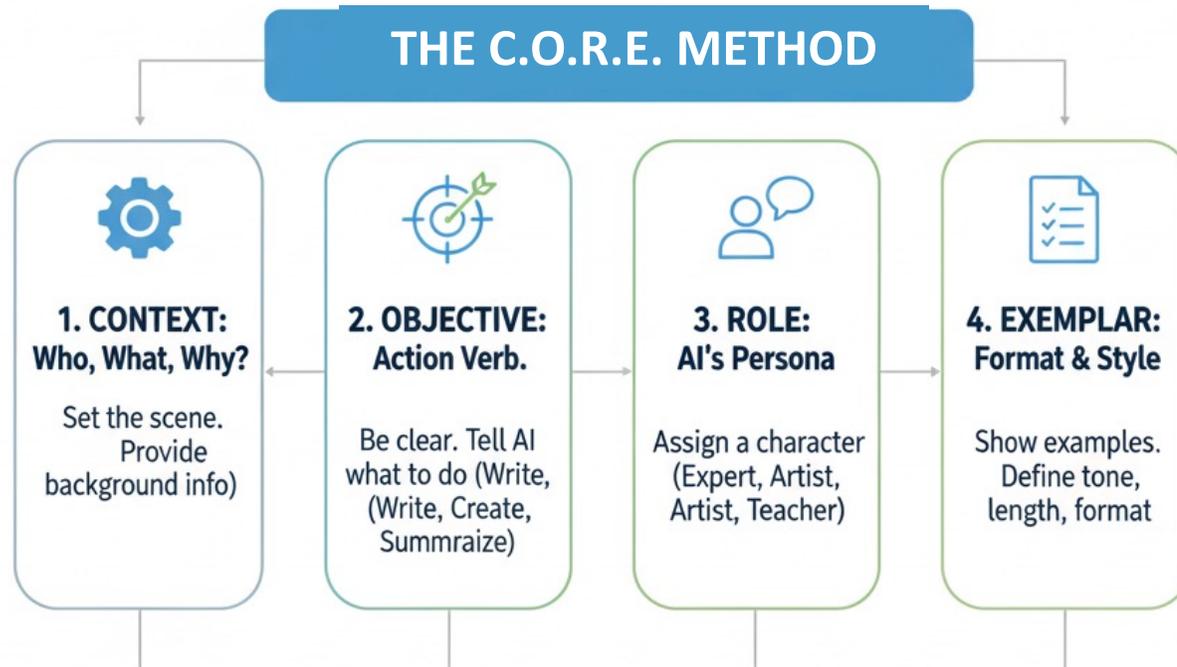
•**Framework:** Introduces the **C.O.R.E.** method as a simple tool for building better prompts.

•The Acronym:

- **C - Context:** The background and "why."
- **O - Objective:** The specific task or verb.
- **R - Role:** The persona the AI should adopt.
- **E - Exemplar:** The desired format, tone, and style.

A powerful prompt has four essential components: providing **Context** for the task, defining a clear **Objective**, assigning a specific **Role** to the AI, and giving an **Exemplar** to guide the output's format and tone.

AI PROMPT ENGINEERING: BEST PRACTICES FOR GREAT RESULTS



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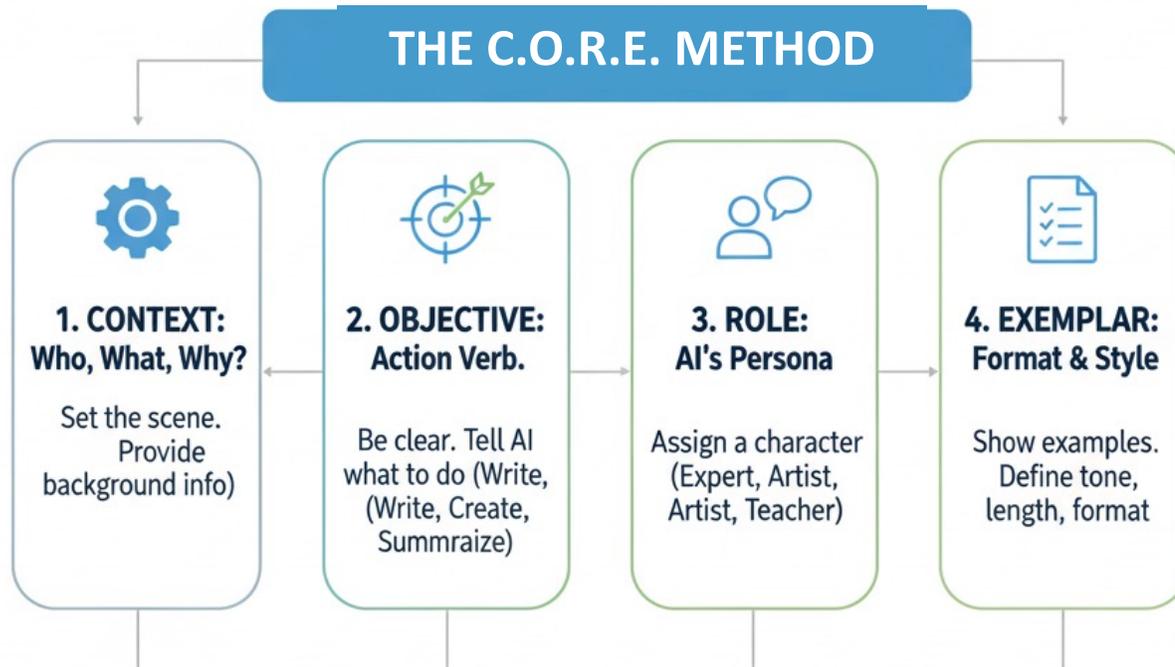
Best Practices for Writing **Text** Prompts

- **Be Specific:** Avoid ambiguity to get clear results.
- **Iterate and Refine:** Treat prompting as a conversation; give feedback to improve the AI's answers.
- **Use Constraints:** Set boundaries on length, style, or content to guide the output.

Be highly specific and engage in a conversational back-and-forth with the AI to refine answers, and to use constraints to clearly define the boundaries of the desired response.

AI PROMPT ENGINEERING: BEST PRACTICES FOR GREAT RESULTS

THE C.O.R.E. METHOD



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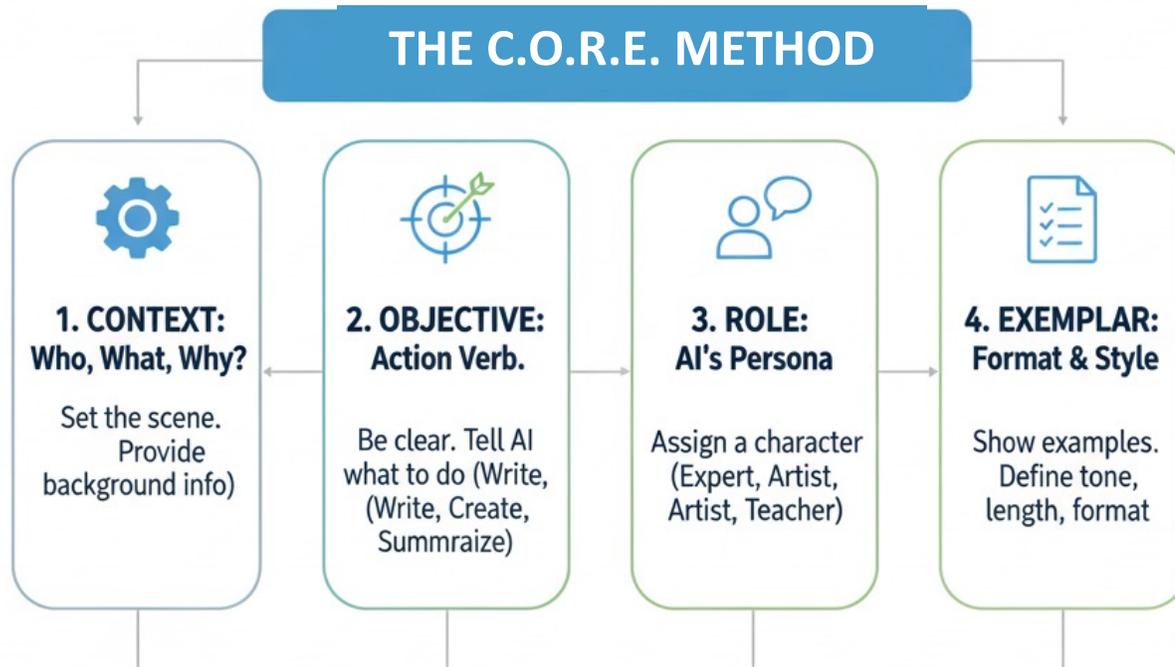
Image Prompting in Action & Best Practices

- Clear Example:** Shows the dramatic difference between a simple prompt ("A spaceship") and a detailed one.
- Best Practices:** Recommends stacking adjectives, referencing specific artists, and using negative prompts to exclude unwanted elements.
- Encouragement:** Stresses that experimentation is the best way to learn and master image generation.

Use multiple descriptors and referencing specific art styles, and experiment with different words and phrases to see how they influence the final image.

AI PROMPT ENGINEERING: BEST PRACTICES FOR GREAT RESULTS

THE C.O.R.E. METHOD



GENERAL PRO TIPS



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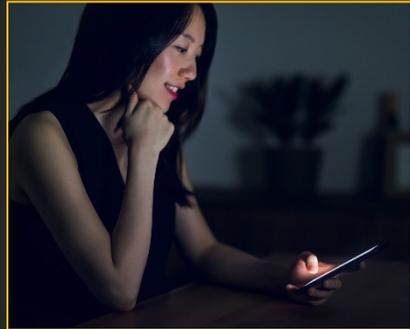
Unlock the Full Power of AI Communication!

Prompting for **Videos**: Directing a Digital Movie

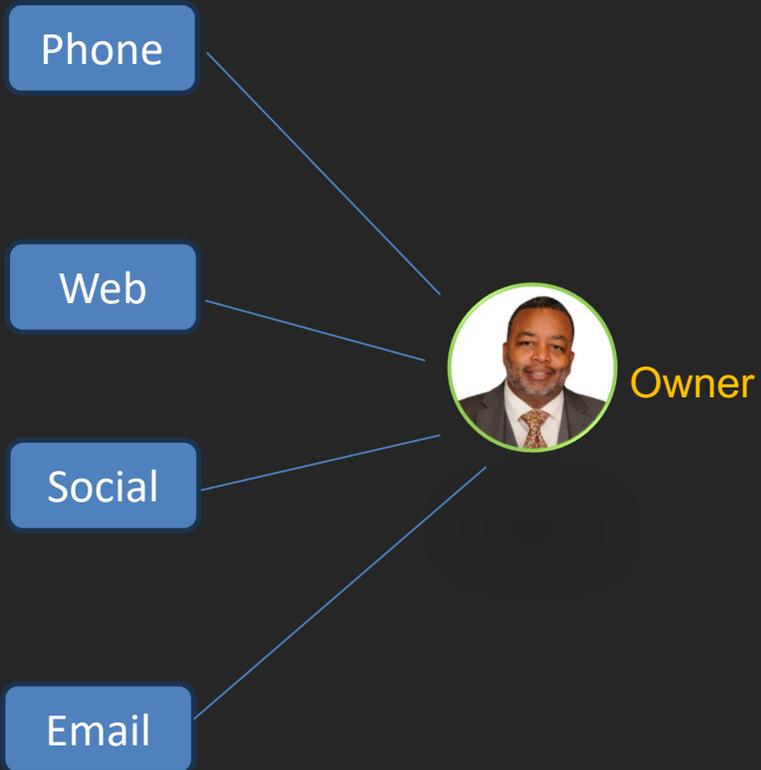
- Main Principle:** Video prompts are all about describing **motion and action**.
- Key Elements:** A good prompt defines the **subject, scene, action, camera movement, and mood**.
- Director's Mindset:** Encourages users to think like a movie director by describing a continuous scene.
The key is to describe action and movement. It advises users **to adopt a director's mindset, clearly defining the scene, the subject's actions, and even camera movements** to guide the AI in creating a short, dynamic video clip



Implementing AI



Customer



Implementing AI



Customer

Phone

Web

Social

Email



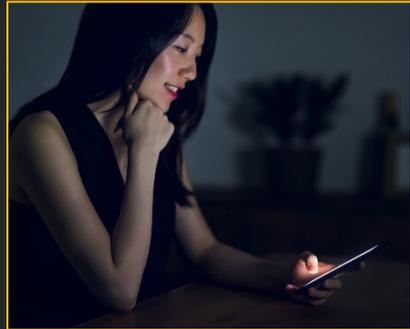
Owner



Admin



Implementing AI



Customer

Phone

Web

Social

Email



Owner



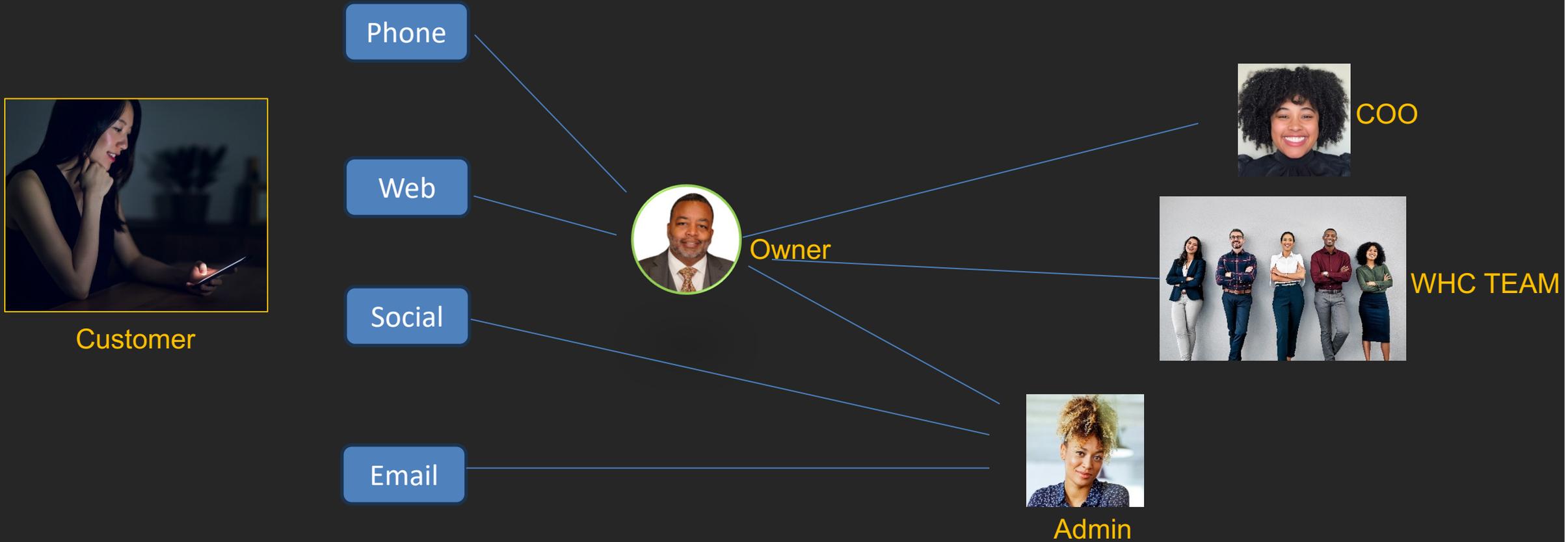
WHC TEAM



Admin



Implementing AI



Implementing AI



Customer

Phone

Web

Social

Email



Owner



COO



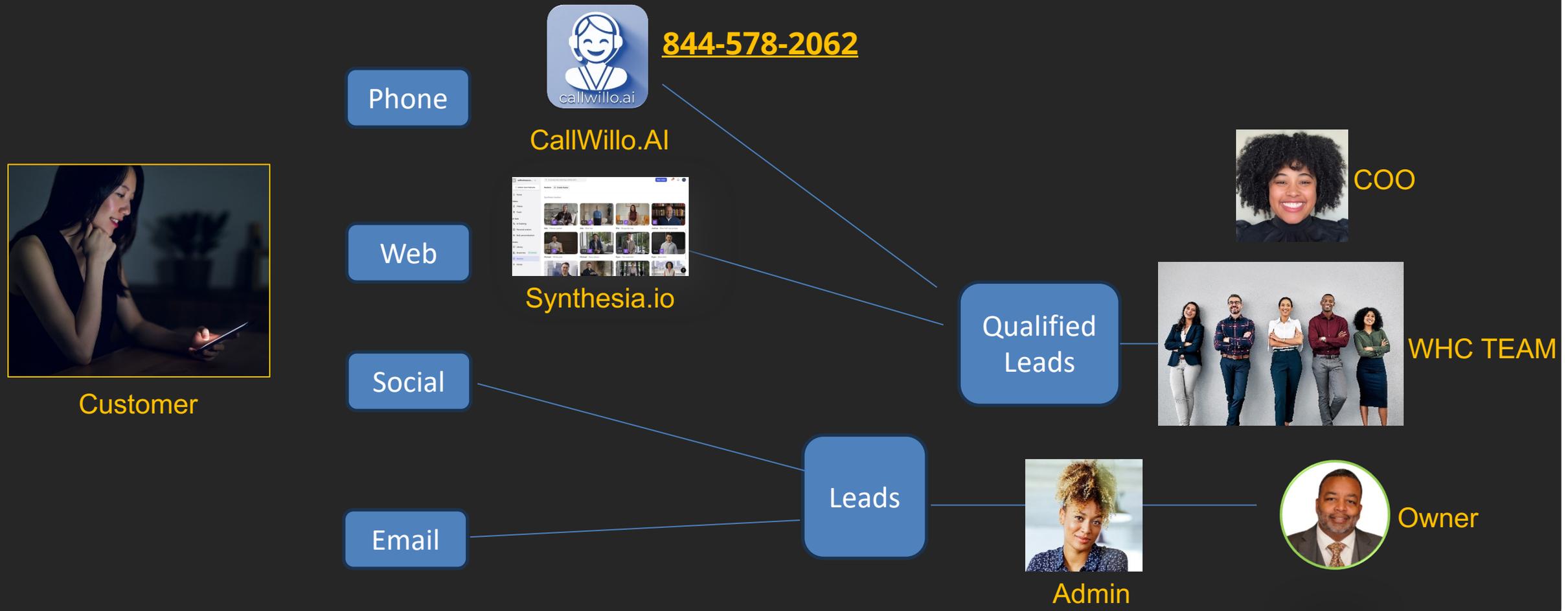
WHC TEAM



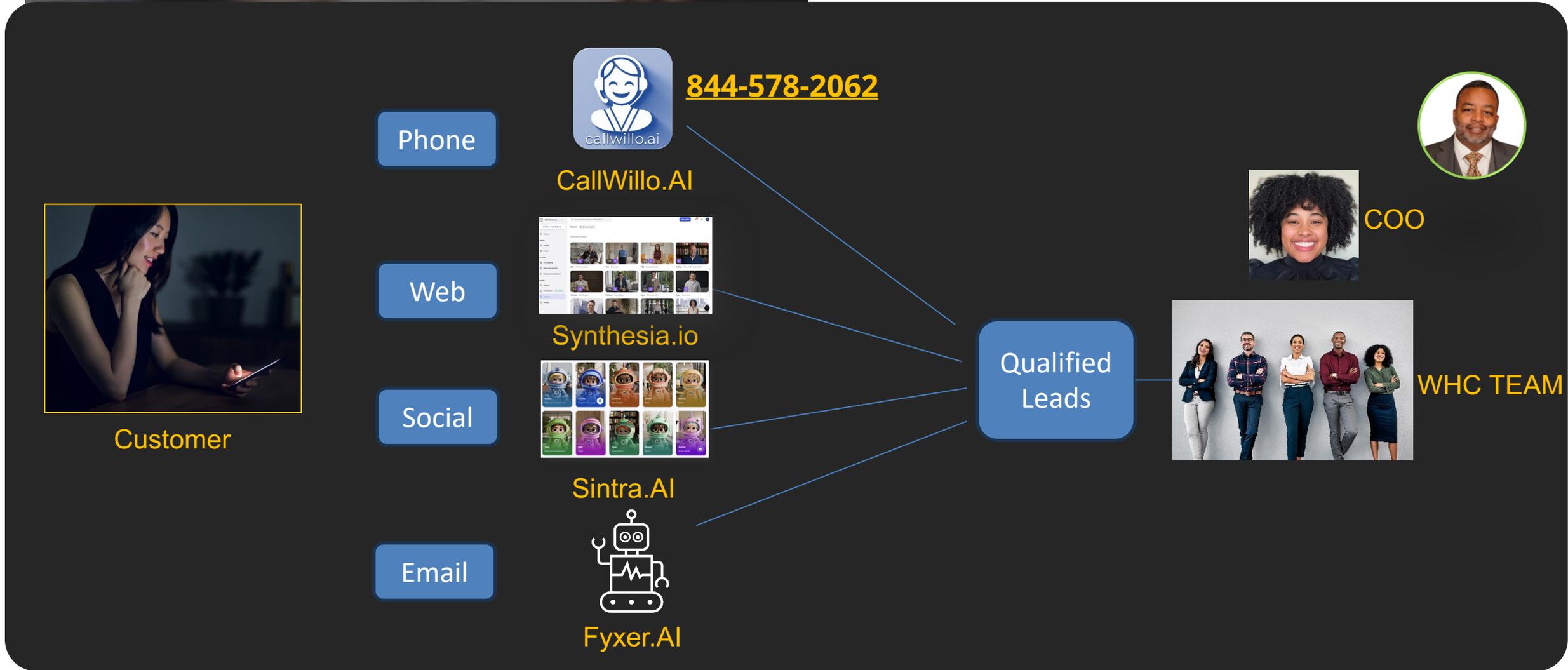
Admin



Implementing AI



Implementing AI



AI in Finance and Accounting

General Ledger

Balance Sheet

Law Firm
General Ledger

Project ID: 05.1000.2024
Period: 12/31/2023
Page: 1

Account Number	1010.00	General	Opening Balance	Debit Amounts	Credit Amounts
11000001	TRCASH	Bank # 1075	750.00		
11000002	TRCASH	Bank # 1071	80.00		
11000003	TRCASH	Bank # 1069	80.00		
11000004	TRCASH	Bank # 1067	80.00		
11000005	TRCASH	Bank # 1065	80.00		
11000006	TRCASH	Bank # 1063	80.00		
11000007	TRCASH	Bank # 1061	80.00		
11000008	TRCASH	Bank # 1059	80.00		
11000009	TRCASH	Bank # 1057	80.00		
11000010	TRCASH	Bank # 1055	80.00		
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11000012	TRCASH	Bank # 1051	80.00		
11000013	TRCASH	Bank # 1049	80.00		
11000014	TRCASH	Bank # 1047	80.00		
11000015	TRCASH	Bank # 1045	80.00		
11000016	TRCASH	Bank # 1043	80.00		
11000017	TRCASH	Bank # 1041	80.00		
11000018	TRCASH	Bank # 1039	80.00		
11000019	TRCASH	Bank # 1037	80.00		
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11000021	TRCASH	Bank # 1033	80.00		
11000022	TRCASH	Bank # 1031	80.00		
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11000045	TRCASH	Bank # 985	80.00		
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11000189	TRCASH	Bank # 697	80.00		
11000190	TRCASH	Bank # 695	80.00		
11000191	TRCASH	Bank # 693	80.00		
11000192	TRCASH				

AI in Operations and Supply Chain

Here are the best AI tools for operations and supply chain, with the problems they solve.

This category is all about balancing supply and demand. Holding too much inventory wastes cash (poor working capital), while holding too little leads to stockouts and lost revenue.

Anaplan: A powerful platform for "connected planning." It uses AI to link your **demand forecasts** (what you'll sell) directly to your **operational capacity, supplier lead times, and financial budgets**.

Netstock or Prediko: These tools are more focused on **inventory optimization** and are excellent for businesses that buy and sell **physical products** (e.g., e-commerce, distribution). They use AI to analyze sales history and trends to produce highly accurate demand forecasts.

Blue Yonder (formerly JDA Software): An enterprise-grade platform that uses AI for **end-to-end supply chain management**, including logistics and route optimization.

Celonis: This is a "process mining" tool. It's a more advanced tool that uses AI to **analyze your company's existing software logs (from your ERP, CRM, etc.)** to create a visual map of your actual business processes to identify bottlenecks.



AI in Marketing (Outbound)



You, your team and AI create the marketing strategy, ads, promotional materials, outbound and follow-up campaigns.



AI Manages the Digital Marketing Process

- Events
- Phone
- SEO
- LLM
- Email
- Social
- Collabs
- Promo
- Affiliates



Customer



AI manages follow-up

Qualified Leads & Appointments



Opt-Out Human/ Quality Assurance



Your team fulfills the product, and AI manages communication and logistics



What Are AI Agents?

An AI Agent is a system that perceives its digital environment, makes decisions, and takes actions to achieve a specific goal.

Unlike simple automation (like a script that copies data from A to B) or Robotic Process Automation (RPA) which mimics human clicks, an AI agent can reason, self-correct, and learn.

For example:

"Monitor our finance email. When a new invoice arrives, extract the details, verify it against the purchase order in our ERP, approve it if it matches, and schedule the payment for 5 days before the due date."

The agent formulates and executes the entire workflow on its own.

Unless you are a developer, you would use Low-Code/No-Code Agent Platforms:

The easiest entry point is through platforms designed to build and deploy agents. Tools like **Zapier Central, Make, Microsoft Power Automate, Google Enterprise, or Open AI Agent Toolkit** provide agentic workflow platforms.

ROI

The return on investment (ROI) for implementing AI in a growing business is typically realized through two primary avenues: **cost reduction and revenue generation.**

ROI

On the **cost** side, AI drives operational efficiency **by automating repetitive, manual tasks**—such as data entry, customer service inquiries, and report generation—which frees up employee time for **higher-value strategic work**.

This automation also reduces the frequency of costly human errors and streamlines complex workflows.

ROI

On the **revenue** side, AI tools can analyze vast amounts of customer data to deliver personalized marketing, optimize pricing strategies, and predict sales trends, leading to **higher conversion rates and increased customer lifetime value**.

Beyond these direct financial gains, AI delivers "soft" ROI by improving customer satisfaction through 24/7 support (chatbots) and enabling faster, more accurate data-driven decisions by leadership.

The Process for Evaluating AI ROI

First, clearly define a specific problem to be solved and establish a baseline metric for the current process (e.g., "Our team spends 20 hours per week on manual invoicing").

Second, calculate the Total Cost of Ownership (TCO), which includes not only the subscription or license fee but also the costs of implementation, data integration, employee training, and ongoing maintenance.

Third, forecast the projected benefits, quantifying tangible returns (like "15 hours saved per week" or "a 10% reduction in data errors") and noting intangible gains (like "improved employee morale").

Finally, compare the TCO to the value of the benefits and calculate the projected ROI and the payback period, ensuring the investment aligns with the company's financial and strategic goals.

Recommended KPIs for Evaluating AI Tools

Total Cost of Ownership (TCO)

- **Subscription / License Fee:** \$_____ (per month/year/user)
- **Implementation / Setup Cost:** \$_____ (One-time fee or internal hours)
- **Training Cost:** \$_____ (Estimated hours x employee cost)
- **Integration & Maintenance:** \$_____ (Cost to connect to other software)
- **Total Estimated 1-Year Cost:** \$_____

Projected Benefits & ROI

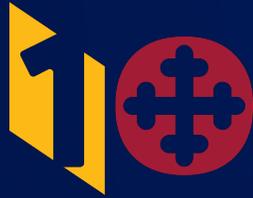
Key KPI to be Improved: (e.g., Time spent on data entry, Lead conversion rate)

Projected Tangible Benefit:

Example: "Reduce data entry by 4 hours/week per rep. (4 hours x 5 reps x \$XX/hour = \$Y savings/week)"

Intangible Benefits: (e.g., Improved employee morale, faster decision-making, better customer data)

Projected Payback Period: (Total Cost / Monthly Savings = Months to Break Even)



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Will Holmes

Founder of WHC

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