



# AI STARTER KIT FOR SMART SMALL BUSINESSES

## WORKSHOP RECAP

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# AI Starter Kit for Smart Small Businesses

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Customer Segmentation + AI Workflow + 4-Week Content System

**Facilitator:** Kaan Bozoglu

This document recreates the full workshop flow so you can repeat it at home. Follow the steps in order. Copy every final output into your Google Sheet. If it is not in the sheet, it does not exist.

## The core promise

By the end of the process, you will have four assets:

- A Business Snapshot
- Three to five verified customer segments
- A simple channel strategy per segment
- A 4-week content plan you can execute immediately

You should leave with finished assets, not loose ideas.

## The mindset and the rules

AI is your intern, not your boss. It can confidently state facts that do not exist. Context controls quality. You make the final decision.

- Work in the sheet
- One decision at a time
- Progress over perfection
- Ask better questions, get better outputs

## Prompting fundamentals

The golden rule of context: always include Segment, Channel, Goal, and Constraints.

A good prompt has six inputs:

- Business and offer. What you actually sell
- Customer type. Who you are targeting
- Goal. What you want to achieve
- Channel. Where this will be published
- Tone. How it should sound

- Constraints. Word count, rules, limits, UAE-only examples, format requests

Prompt placeholder:

## Your AI stack

Use the right brain for the right job.

### The strategist

- ChatGPT or Gemini. Strategy, structure, writing, hooks, and tables
- Outputs: bullets, tables, drafts
- Not a source of truth. Label assumptions

### The researcher

- Perplexity. Real-time facts, stats, market validation, and where people hang out
- Outputs: answers with citations
- Verify by opening the source links

### The factory

- Google Sheets. Your strategy home. Every output gets stored
- Canva. Design, exports, and handoff

Rule: keep links updated. If it is not in the sheet, it does not exist.

## Setup checklist

Before you start, get your workspace ready.

- Open the shared Google Sheet. Confirm these tabs: Inputs, Patterns, Segments, Channels, Content, Creatives
- Open Perplexity. Turn on Pro or Copilot if available
- Open Gemini or ChatGPT in a fresh chat window
- Open your Canva template link
- Create a desktop folder named Workshop Assets
- Optional: log in to Google Drive for easy file links

Links to add:

- [INSERT LINK: Google Sheet]
- [INSERT LINK: Canva template]
- [INSERT LINK: Prompt pack short link]

## The workflow overview

You will run this in a loop. Research. Generate. Organize. Produce.

### Step 1. Gather facts with Perplexity

1. Open Perplexity and sign in. Turn on Pro or Copilot if available.
2. Ask a focused query: who + where (UAE) + goal + constraint.
3. Use filters inside the query when needed: site:gov.ae, filetype:pdf, after:2023-01-01.
4. Ask for sources and stats. Click the source cards and verify domains.
5. Refine: narrow to a specific emirate, industry, or business size. Ask for a table if you need structure.
6. Save your work. Copy the thread link and paste the top source URLs into your Sheet, Inputs tab.
7. Write a 5 to 7 bullet summary for the segment. Paste into Patterns or Inputs, depending on your sheet setup.

### Step 2. Generate with ChatGPT or Gemini

8. Start a new chat. Title it with your business name.
9. Paste your 6-input context prompt to set the rules for the AI.
10. Run Prompt 1 to clean raw notes into patterns.
11. Run Prompt 2 to generate segments. Pick your top 3 to 5.
12. Run Prompt 3 to generate a simple channel plan. Keep it simple.
13. Run Prompt 4 to generate a 4-week content plan. Ask for short captions.
14. Copy every output into the correct Sheet tabs. Do not rely on screenshots.
  - Ask for table-friendly output or CSV format with headers for easy pasting
  - Use constraints like UAE-only examples and bullets under 12 words
  - Iterate fast. Shorter. Fewer options. Plain language. More professional

### Step 3. Organize in Google Sheets

15. Paste Perplexity insights and URLs into Inputs.
16. Paste AI-cleaned themes into Patterns. Highlight repeats.
17. Paste final segments into Segments. Add one real example customer for each.
18. Build a scorecard: Urgency, Ability to Pay, Reachability, Fit. Sort by average to find winners.
19. Paste channel plan into Channels. Add at least one conversion path per segment.
20. Paste the 4-week plan into Content. Add Canva file links in Creatives.
21. Keep one row equals one idea. Use Paste values only when needed.

### Phase 1. The Download

Goal: get your business knowledge out of your head and into a system.

#### Live work. 7-minute brain dump

22. Open the Business Snapshot tab. Fill basics: offer, price, location, ideal customer profile.
  23. Open the Customer Notes tab. Dump everything you know, one idea per line.
  24. Start a 7-minute timer. Do not polish. Write fast. Add real quotes if you have them.
- If you have little or no customer notes, use your baseline generator first.

## CHATGPT/GEMINI PROMPT 0. BASELINE CUSTOMER NOTES GENERATOR

*Use this if you have little or no customer notes.*

### Role

You are a customer research assistant.

### Goal

Generate a baseline set of customer notes for my business. These are hypotheses to start segmentation. They must be realistic and specific. They must not be presented as confirmed facts.

### Rules

1. Do not claim you interviewed anyone.
2. Output as "Assumption based" insights.
3. If something depends on geography or industry norms, say so.
4. Keep it practical. Write like real customer notes, not marketing copy.
5. Separate B2B and B2C logic. If my business is mixed, do both.
6. Include a confidence rating per theme, 1 to 5, based on how common it typically is.

### Step 1. Ask me for missing inputs

If any of the fields below are blank, ask only for the missing ones, then wait.

### Business snapshot inputs

Business name:

Industry:

Offer type: product, service, both

B2B or B2C or both:

Target geography: city, emirate, country

Price level: budget, mid, premium

Sales motion: walk in, WhatsApp, website form, phone, marketplace, other

Typical customer: who they are in one line

Top 3 competitors:

Differentiator: why choose you

Seasonality: yes or no, explain

Languages: English, Arabic, other

### Step 2. Produce baseline customer notes

Create 60 to 100 raw customer notes that sound like what customers say or write.

Format as one line per note.

Include variety:  
Questions they ask  
Complaints and frustrations  
Reasons they delay  
What makes them trust  
What makes them bounce  
Mention channels where the note came from, as a label:  
Google review, WhatsApp chat, phone call, Instagram DM, walk in, website form, referral

Step 3. Turn notes into the same structure as Prompt 1 expects  
A. Themes, 6 to 10  
For each: theme name, what it means, confidence 1 to 5

B. Tables  
Top problems  
Triggers  
Objections  
Desired outcomes  
Each with bullet style inside cells

Step 4. Validation checklist  
Give me a short list of actions to validate the assumptions in 30 to 60 minutes:  
5 fast checks, reviews, competitor reviews, forums, Reddit, Google autosuggest, etc  
5 direct questions to ask 3 real customers

Now start.  
Here is my Business snapshot:  
PASTE FILLED FIELDS HERE:

## **Block 1. Clean raw customer notes**

Goal: turn messy notes into patterns you can use.

25. Copy your Customer Notes from the sheet.
26. Paste into Gemini or ChatGPT.
27. Run Prompt 1 to clean and structure the notes.
28. Paste the organized notes back into your Segment Building Blocks sheet tab.

## **CHATGPT/GEMINI PROMPT 1. CUSTOMER NOTES CLEANUP AND INSIGHT THEMES**

### Role

You are a customer insight analyst.

### Goal

Turn messy customer notes into clean, reusable insight blocks that will be used to build customer segments next.

### Input

I will paste raw customer notes below. These notes may include duplicates, slang, mixed languages, opinions, and random context.

### Rules

1. Keep the customer meaning. Remove filler, chatter, and repeated lines.
2. Do not invent facts. If something is unclear, label it as unclear.
3. Normalize wording. Use simple, consistent terms.
4. Merge duplicates. Keep one best version.
5. If notes include multiple industries, keep them separated.
6. If notes include multiple offer types, separate them too.
7. If you see numbers, timeframes, locations, platforms, or budgets, keep them.
8. Keep the output short and operational. No essays.

### Step A. Cleaned notes

Return a cleaned list. One line per note.

Format each line like this:

ID 001, cleaned note

### Step B. Themes

Group the cleaned notes into 6 to 10 themes.

For each theme, include:

Theme name

What it means in one sentence

Supporting note IDs

### Step C. Insight extraction tables

Create 4 tables. Each table must be bullet style inside the cells.

Table 1. Top problems

Columns: Theme, Problem bullets, Supporting note IDs

Table 2. Triggers

Columns: Theme, Trigger bullets, Supporting note IDs

Table 3. Objections

Columns: Theme, Objection bullets, Supporting note IDs

Table 4. Desired outcomes

Columns: Theme, Outcome bullets, Supporting note IDs

Step D. Segment building blocks

Create a final table called Segment building blocks.

Columns:

Common jobs to be done, Common pains, Common gains, Buying signals, Decision blockers, Must have keywords

Bullet rules for table cells

Use short bullets.

One idea per bullet.

Max 6 bullets per cell.

Now process these raw notes

Paste the notes after this line:

**RAW NOTES:**

[PASTE HERE]

**Block 1 is completed when you have:**

- Clear customer patterns
- Top 3 pains
- Top 3 desired outcomes

## **Block 2. Build customer segments**

Goal: create 3 to 5 segments you can market to.

### **What a segment must include**

- Who they are. Role, situation, environment. Include job title, location, company size, experience level.
- What they want. Desired state, specific goals, speed of result.
- What stops them. Cost objections, fear of failure, complexity, bad past experience.
- What wins them over. Trigger event, proof point, guarantees, urgency, social proof.



### **Live work. Build your segments**

29. Run Prompt 2.
30. Pick the best 3 to 5.
31. Rename the segments in plain language.
32. Add one real example customer for each.

## **CHATGPT/GEMINI PROMPT 2. BUILD CUSTOMER SEGMENTS FROM INSIGHTS**

### Role

You are a segmentation strategist.

### Goal

Use the insight output below to create 5 distinct customer segments that are real, non-overlapping, and actionable for marketing.

### Input you will receive

The cleaned notes, themes, and the Segment building blocks table from Prompt 1.

### Rules

1. Do not invent facts. Only use what is supported by the input.
2. Segments must not overlap. Each segment needs a clear “this is not the others” line.
3. Keep segments practical. A marketing team should be able to target them tomorrow.
4. Prefer segments based on situation and intent. Not vague demographics.
5. If the input is missing a detail, write “Unknown from notes” and suggest what to research.
6. Use the same wording as the customer when possible. Mirror their phrases.
7. Keep it tight. Bullets over paragraphs.

### Step 1. Segment map

Create exactly 5 segments.

For each segment, define it using:

Primary situation

Primary goal

Primary blocker

One sentence boundary, who this segment is not

### Step 2. Segment profiles

Create a table with 5 rows, one per segment.

#### Columns

Segment name

Profile, 3 to 5 bullets

Core pains, 4 to 6 bullets

Triggers, 3 to 5 bullets

Objections, 3 to 5 bullets

Decision criteria, 4 to 6 bullets

Best offer angle, 2 to 4 bullets

Best channels, rank top 3 with why in 1 bullet each

Keywords they would search, 8 to 12 phrases

One sample hook, max 18 words

Step 3. Confidence and gaps

For each segment, add:

Confidence score 1 to 5

What we still need to know, 2 to 4 bullets

Best research question to validate it, 1 line

Step 4. Perplexity research briefs

Create 5 research briefs, one per segment, that I can paste into Perplexity.

Each brief must include

Segment name

Business type and location, if known

What to find, 6 bullets

Questions to answer, 6 bullets

Search queries to run, 10 queries

Preferred sources, 5 bullets

Formatting rules

Use simple tables.

Use bullets inside cells.

No long paragraphs.

Now create segments using this input

**PASTE PROMPT 1 OUTPUT BELOW:**

**[PASTE HERE]**

## Reality checks

Traffic light check for each segment:

- Hallucination. Stop and retry with more detailed inputs.
- Close. Good direction but needs refinement. Tighten fears and triggers.
- Perfect. Accurate and actionable. Copy to the sheet.

Segment scorecard. Rate each from 1 to 5:

- Urgency. Do they need to solve this now
- Ability to Pay. Can they afford your solution
- Reachability. Can you reach them on a channel you can afford
- Fit. Do you want to work with them

Hard truth reality check. Delete the segment if any answer is no:

- Can you find these people in real life
- Do they have money and urgency
- Can you reach them on a channel you can afford
- Do they have a clear trigger event

### **Block 2 is completed when you have:**

- Three to five named segments
- A best offer angle per segment
- Top channel guesses identified

## Block 3. Simple channel plan

Goal: match segments to channels with a clear job for each channel.

### Channel jobs

- Awareness. Get them to stop scrolling. Best formats: short-form video, educational carousels, collaborations.
- Capture. Get their contact info. Best formats: native lead forms, WhatsApp click-to-chat, a simple landing page.
- Nurture. Build trust and authority. Best formats: email series, WhatsApp broadcasts, deep-dive LinkedIn posts.

### **Live work. Build your channel plan**

33. Run Prompt 3 once per segment using Perplexity.
34. Edit the selection based on your reality and budget.
35. Add one conversion path per segment.

Prompt placeholder:

### **PROMPT 3. PERPLEXITY SEGMENT DEEP DIVE + BEST CHANNEL PICK**

#### Role

You are a market research analyst and channel strategist.

#### Context

I will paste 1 customer segment below. Your job is to validate it with external evidence and choose the best channel mix to reach it.

#### Rules

1. Use sources. Cite every key claim.
2. Prefer recent sources. Use the latest 24 months when possible.
3. If the segment detail is missing, infer carefully and label it as an assumption.
4. Focus on UAE first if a location is mentioned. If not, use the closest comparable market and say so.
5. Do not give generic advice. Tie recommendations to evidence and behavior.

#### What I will paste

Segment name, profile, pains, triggers, objections, decision criteria, keywords, best offer angle, best channels guess.

#### Deliverables

##### A. Segment reality check

Return:

Who they are, 5 bullets

What they are trying to achieve, 5 bullets

What stops them, 5 bullets

How they decide, 5 bullets

Top 3 misconceptions brands have about this segment, 3 bullets

##### B. Where they hang out

List their likely touchpoints, grouped by:

Search intent, Google and Maps behavior

Social platforms, which ones and why

Communities, forums, groups, associations

Offline touchpoints, events and venues

Tools they use, apps, marketplaces, directories

For each item, include a short reason and at least one citation.

##### C. Best channels ranked

Pick the top 5 channels to reach this segment.

For each channel include:

Why it fits this segment, 3 bullets with citations

Typical targeting options, keywords, interests, placements, or filters

Best content formats, 3 to 5

Best CTA type

Expected time to impact, short, medium, long

Main risk and how to reduce it

D. Message and offer guidance

Provide:

Top 10 message angles this segment responds to

Words and phrases to use, 15

Words and phrases to avoid, 10

2 offer examples that match their decision criteria

3 sample hooks, max 14 words each

E. Competitor and benchmark scan

Find 3 to 5 competitors or adjacent brands targeting this segment.

For each:

What channel they use most

What their main message is

What they do well

What they miss

Include citations.

F. Research appendix

Provide:

10 best Google queries

10 best Perplexity queries

10 best TikTok or YouTube search phrases if those channels are relevant

A short list of the most credible sources for this segment

Now analyze this segment

**SEGMENT INPUT:**

[PASTE 1 SEGMENT HERE]

**Block 3 is completed when you have:**

- A clear channel plan per segment
- A conversion path per segment saved in the sheet

## Block 4. 4-week content outline

Goal: consistent content with low effort.

### Content recipe for every post

- Hook. Pattern interrupt. Stop the scroll with a bold statement or question.
- Value. One clear takeaway. Teach one micro-solution.
- Proof. Evidence it works. Screenshot, statistic, or mini case study.
- CTA. One instruction. One action.

### Weekly theme planner. 28-day cycle

- Week 1. Problem awareness. Focus on the pain. Empathy.
- Week 2. Proof and process. Show how you solve it. Authority.
- Week 3. Offers and objections. Make the offer clear. Conversion.
- Week 4. Stories and results. Social proof. Trust.

Pro tip: rotate the cycle per segment. Do not mix segments in the same week.

### Generate the calendar

36. Run Prompt 4 to generate a 4-week content calendar.

37. Paste results into the Content tab in your sheet.

38. Keep captions short and table-friendly.

Prompt placeholder:

**CHATGPT/GEMINI PROMPT 4. CONTENT CALENDAR. 4 WEEKS. 5 SEGMENTS. 3 POSTS PER SEGMENT PER WEEK. PER CHANNEL.**

**Role**

You are a content strategist and production planner.

**Goal**

Create a 4 week content calendar that targets 5 customer segments using the segment research and channel picks we already built.

**Posting volume**

3 posts per segment, per week.

5 segments.

4 weeks.

Total posts: 60.

**Channel rule**

Each segment uses its own primary channel, chosen from the research.

So you are creating 3 posts per segment per week, for that segment's channel.

**Inputs I will paste**

1. The 5 final customer segments.
2. The Perplexity deep dive output for each segment, including ranked channels, messaging angles, and competitor notes.
3. Business basics, offer, location, CTA links.

**Non negotiables**

1. Output must be a single table that I can copy and paste into Google Sheets.
2. Output the table as tab separated values only. No extra commentary. No blank lines. Keep every cell single line. If you need line breaks, use " | " inside the cell.
3. Include an Image Prompt column. These prompts will be used in Gemini to generate images.
4. Every row must include a clear CTA.
5. Every row must map to exactly one segment.
6. Every row must map to one primary channel. No multi channel rows.
7. Keep captions short. Use a caption outline, not full long captions.

For each segment, include:

Primary channel  
Top 10 message angles  
Words to use  
Words to avoid  
Top 10 keywords  
Top 3 competitor patterns to beat

Calendar structure  
Duration: 4 weeks  
Funnel stages by week  
Week 1. Awareness  
Week 2. Consideration  
Week 3. Proof  
Week 4. Conversion

Weekly post mix per segment  
Post 1. Education  
Post 2. Proof or example  
Post 3. Offer or CTA push

Table columns  
Week  
Segment  
Primary channel  
Post number  
Funnel stage  
Post goal  
Content format  
Hook  
Caption outline, 3 to 5 bullets max  
CTA  
Creative concept  
Gemini image prompt  
Landing page or WhatsApp link  
UTM slug  
Success metric  
Post date  
Posting time  
Owner  
Status (Draft, Approved, Scheduled, Posted)  
Asset file name  
Alt text (for accessibility and SEO)  
Notes (for small tweaks, localization, approvals)  
Use exactly 4 content pillars across all posts, and tag each post with one pillar.  
Example pillars: Education, Proof, Process, Offer

#### Rules for Hook

Max 12 words.

Must match the segment's pains or desired outcomes.

No vague claims.

#### Rules for Caption outline

3 to 5 bullets.

Short bullets.

One idea per bullet.

Include one proof bullet when relevant.

No hashtags unless the primary channel is Instagram.

If Instagram, max 5 hashtags, all relevant.

#### Rules for Creative concept

Write what the visual should be.

Include:

Scene and subject

Setting

Text overlay, max 7 words

Composition, close up or wide

Brand vibe

Do not mention competitor brands.

#### Rules for Gemini image prompt

Brand color accents allowed (mention your palette)

No text in the image, text overlay is handled in design

Include "clean negative space for overlay"

Specify subject diversity when humans appear

Specify "no distorted hands, no extra fingers" in negative prompts

Specify logo rule, either "no logos" or "only our logo placeholder area"

Must be ready to paste into Gemini.

Each prompt must include:

Photorealistic style

Subject description

Setting and location context

Lighting

Camera angle

Depth of field

Negative prompts, what to avoid

Aspect ratio by channel:

Instagram feed and Facebook, 1:1

Instagram story and reels cover, 9:16

LinkedIn, 16:9

Google Business Profile post, 4:3

UTM rules

utm\_source = channel name

utm\_medium = organic

utm\_campaign = segment name short

utm\_content = w#\_s#\_p#

Example

?utm\_source=instagram&utm\_medium=organic&utm\_campaign=segment1&utm\_content=w1\_s1\_p1

Success metrics by channel

LinkedIn: saves, comments, profile visits, link clicks

Instagram: reach, saves, DMs, link clicks

Facebook: reach, comments, messages

Google Business Profile: calls, direction requests, website clicks

TikTok: watch time, profile visits, DMs

Quality checks before output

60 rows exactly

12 rows per segment

Week 1 equals awareness only, week 4 equals conversion only

Every row has hook, 3 to 5 caption bullets, CTA, creative concept, Gemini prompt,

UTM, metric

UTM slugs are unique across all 60 rows

If CTA is WhatsApp, include the exact prefilled WhatsApp message text in a new column called WhatsApp prefill.

If CTA is a page link, include the page slug only. Do not repeat full URLs.

Now build the calendar using the inputs below

**PASTE SEGMENTS AND RESEARCH HERE:**

[PASTE HERE]

PASTE BUSINESS BASICS HERE:

Offer:

Location:

Primary CTA link:

Secondary CTA:

Brand style notes:

Services focus this month:

## Raw image creation for the calendar

39. Use the **GEMINI** image prompt cell for each content row.

40. Generate the image, export it, and rename it.

41. Update the file name or link in the Content Calendar sheet.

Image prompt placeholder:

**Block 4 is completed when you have:**

- A 28-day content calendar
- Raw images created for the calendar
- Funnel stages mapped by week

## Execution and production pipeline

### The 70/30 rule

- Pick one main channel per segment for 70% of your effort.
- Pick one test channel per segment for 30% of your effort.
- Do this now. Decision beats hesitation.

### Populate the calendar. Execution steps

42. Paste the 4-week outline into the Content Calendar tab.

43. Link creatives. Paste exported file links into the Creatives column.

44. Assign an owner and due date for every row. The sheet becomes the boss.

### Quality assurance checklist

- Message matches the segment
- One goal per creative
- Readable text contrast
- Single clear CTA
- Link and QR code tested

### Gemini workflow

45. Pick segment and goal, example: Segment A plus Awareness.

46. Generate 3 image variants per concept.

47. Leave safe space for text overlays.

48. Keep your visual style consistent across the whole set.

### **Canva workflow**

49. Open the Canva template. Make a copy into your account.
50. Set brand basics: background color, cards color, text color, accents color.
51. Import Gemini images and place them in frames. Check cropping.
52. Add short overlays: Hook, Value, CTA. Keep it brief, 8 to 10 words per line.
53. Create size variants for IG Story, FB Feed, LinkedIn.
54. Export PNG or JPG using a naming convention: brand\_segment\_concept\_size\_v1.
55. Paste file links into the Creatives tab.

### **Finish line**

Save your prompt pack link and bookmark it. Repeat this system every month. Your consistency will beat your motivation.

Need implementation help? Add your website link here and your WhatsApp number here.

- Website: [INSERT YOUR WEBSITE LINK]
- WhatsApp: [INSERT YOUR WHATSAPP NUMBER]