SAF AMELIA ISLAND 2026 · AI EDUCATION SESSION

Your AI Project, Step by Step

The long version of the starter sheet. Six steps to fill in at your desk. Nothing here needs a technical answer. Every question is about your own shop.

How this lines up with the four steps on stage: Pick one problem = 1. Teach it your business = 2. The day one rules = 3. Build small and check it = 4 and 5. Fix it and repeat = 6.

Steps 1 to 3: before anything gets built

STEP 1 Pick the one problem

Small, specific, weekly, and it drives you nuts. Not "fix my shop." The one that gets you every Monday.

WRITE IT DOWN

The problem, in one sentence:

What it costs me in a normal week (hours, money, waste):

I will know it is better when:

ASK THE AI

"Here is the problem I want to solve. Ask me questions, one at a time, until you understand how it actually plays out in my week."

At Norton's: *Cameron picked buying. In his words on day one: we will be buying based on need and not just on a feeling.*

STEP 2 Teach it your business

Who you are, who you serve, and how you actually decide. What you would tell a new employee in their first week.

WRITE IT DOWN

My shop in three lines (what we sell, who buys it, what makes us different):

How I decide about this problem today, in my own words:

My rules of thumb, including the ones I have never written down:

ASK THE AI

"Here is how my shop handles ___ today. What else would you need to know to help me with it every week?"
"What is in my head that my shop manager would need to know to run the shop without me for two weeks?"

At Norton's: *It started with that last question, asked before any data, any software, or any decision about tools.*

STEP 3 Set your rules

The standards you set once, in plain English, and it holds them from then on. Say them before you ask for anything.

WRITE IT DOWN

My own rules, in my words:

What I will not let it touch:

ASK THE AI

"These are my rules for this work. Hold them from now on, and tell me when you cannot."
"And the one people forget: tell me when the data disagrees with me. I would rather be corrected than agreed with."

At Norton's: *Four rules written once, on July 3, have held ever since. One is now a button in the app called Show the Math.*

Four rules you can borrow as they are. *"You recommend. I decide."* · *"Every number has to trace back to a file I can open."* · *"If the data cannot answer, say so and tell me what would fix it."* · *"Do not make my team type anything they are not already typing."*

Steps 4 to 6: build it, check it, keep it honest

Now the AI does some of the work. Your job changes from explaining to checking, and checking is the job only you can do.

STEP 4 Talk through the plan before anything gets built

The cheapest place to change your mind. Ten minutes here saves a week of building the wrong thing.

WRITE IT DOWN

What it should hand me, and when (a morning list, a weekly order, an alert):

Who reads it, and what they do with it:

What it will run on, from the records I already keep:

The smallest first version I would actually use on Monday:

ASK THE AI

"Before we build anything, walk me through your plan in plain English. What are you assuming about my shop that you should check with me first?"
"What is the smallest version of this that would still be useful to me next week?"
"Which fits my shop: I ask you when I need it, the same output weekly from a fresh file, or a dashboard I open here, built from a project folder holding my files and your instructions? Recommend one. If it is the dashboard, describe the screen in words and get my approval before building."

At Norton's: *On June 30 a plan conversation changed what the whole thing would be, and it cost nothing, because nothing had been built yet.*

STEP 5 Check it on the real screen

Against the test you wrote in step 1, and in the place the work actually happens. A test passing is not the same as it working.

WRITE IT DOWN

What I checked, and against what:

Where it did not match what I know:

ASK THE AI

"Show me your math. Where did that number come from?"
"That does not match what I see in my shop. Here is what I actually have."

At Norton's: *Our stale-data warning tested perfectly and would almost never have appeared in real life, because it read delivery dates and wedding orders are dated weeks ahead. Only the real screen showed that.*

STEP 6 Fix it, and name the finish line

Corrections make it smarter, and the record of why is the valuable part. Name the finish line so you do not tinker forever.

WRITE IT DOWN

What I corrected, and the reason behind it:

It is good enough to start using when:

The next problem I will point it at:

ASK THE AI

"Here is what you got wrong and why. Write it down and hold it from now on."
"What did you learn from that, what let it happen, and what changes so it cannot happen again?"

At Norton's: *Every time Cameron overruled a recommendation, what he changed and why got written down. His reasoning now sits next to next week's order instead of in his head.*

Where people stall

- **Wanting to start building.** Steps 1, 2 and 3 have no AI in them. Doing them is the work, and skipping them is why most of these projects quietly die.
- **Waiting for clean data.** You will never have it. Start with the records you already keep and let the gaps surface as questions.
- **Accepting a plausible answer.** The first answer that looks right is the most dangerous one. When it disagrees with what you know, say so. You are usually the one who is right.

Turn the page for how this becomes a working tool.

From conversation to working tool

The six steps get you a clear plan. This page is how the plan turns into something you actually open on a Monday.

What you are aiming at, said honestly

Not the dashboard from the session. That one took an IT director about two months on top of real data work. What you can have in a few weeks is an assistant that holds your files and your instructions in one place, that you ask a question on Monday and get an answer you can check. Screens and automatic alerts come later, if you still want them.

Before you start

- **Time and a machine.** A computer you use for shop work, and about an hour a week for a few weeks.
- **An AI assistant that works with files.** It has to read your files, keep your instructions between sessions, and come back to the same place every week. That is a paid tier on any of them, not the free chat box. We used Claude. Others can do this too; those three abilities are what matter.
- **One export you can actually get.** Whatever you already keep. A sales export, invoices, your price sheet. You do not need to clean it first.

What makes it a tool instead of a chat

- **A folder or project of its own.** One place your files and its instructions live, so it is not starting from nothing every Monday.
- **Standing instructions.** The job description page from the other sheet, saved where it can read it every session.
- **The same place, every time.** Same folder, same instructions, every week. Reopening a fresh chat every time is why most people feel like they are starting over.
- **A written record of corrections.** When you correct it, the correction goes in writing into that folder, not just into the conversation.

A realistic four weeks

- **Week one.** Interview. Work steps 1 to 3 and the job description sheet. Nothing gets built. Save its write-up where it can read it again.
- **Week two.** First real answer. Hand it one export and ask one question you already know the answer to. Compare.
- **Week three.** Correct and repeat. Ask it a question you do NOT know the answer to, then check it against the shop.
- **Week four.** Make it routine. Same day each week, same question, and a place your new exports land so it stays current.

What will actually stop you

Not the AI. Getting the export out of your point of sale. Find out this week whether you can, and ask your vendor if you cannot. Everything else waits on that one file.

Where to stop

This is a tool for you and your team, not something you put in front of customers or sell. Keep a copy of the version that worked before you change it, because you will break it at some point.

We used Claude. The method works with any good AI assistant. It took real effort up front, and it pays it back every week.