

AI Skill Roadmap for Small Business Owners

Phase 1: Foundation (Weeks 1–4)

Goal: Understand the basics of AI, data, and cloud tools.

1. **Data Literacy**

- * Learn to organize and clean spreadsheets
- * Track key business metrics (sales, customers)
- * Tools: Excel, Google Sheets

2. **Cloud/SaaS Navigation**

- * Sign up and explore AI-enabled apps
- * Practice uploading data and basic configurations
- * Tools: ChatGPT Enterprise, Canva, Tidio

3. **Cybersecurity Awareness**

- * Set up strong passwords and MFA
- * Understand basic data privacy rules
- * Tools: 1Password, LastPass

Phase 2: Basic AI Usage (Weeks 5–8)

****Goal:**** Start generating outputs and automating simple tasks.

1. ****AI Tool Familiarity****

- * Practice prompts and content generation
- * Experiment with summaries, emails, or social posts
- * Tools: Jasper AI, Notion AI, Google Gemini

2. ****Collaboration Skills****

- * Share AI outputs with team or colleagues
- * Get feedback and iterate
- * Tools: Slack, Notion, Teams

3. ****Critical Thinking****

- * Review AI outputs for accuracy and tone
- * Decide what requires human refinement

Phase 3: Workflow Automation (Weeks 9–12)

****Goal:**** Connect AI tools to automate recurring tasks.

1. **Automation**

- * Create simple workflows: e.g., lead capture → CRM → email
- * Use triggers and actions
- * Tools: Zapier AI, Make, HubSpot AI

2. **Data Monitoring**

- * Learn to interpret automated analytics
- * Tools: Tableau GPT, HubSpot AI dashboards

Phase 4: Advanced Integration (Weeks 13–16+)

Goal: Scale AI usage and customize for your business.

1. **Programming/API Basics**

- * Learn simple scripts to push/pull AI data
- * Tools: Python, Google Apps Script

2. **Complex Workflow Design**

- * Multi-step automations combining several tools

- * Implement AI agents for repetitive processes
- * Tools: Claude Cowork, HubSpot Breeze AI

3. **Continuous Evaluation**

- * Regularly review AI outputs for quality
- * Adjust workflows to maximize efficiency

Suggested Learning Path

1. **Weeks 1–4:** Foundation → Data + Cloud + Security
2. **Weeks 5–8:** Basic AI → Prompting + Collaboration + Critical Thinking
3. **Weeks 9–12:** Automation → Workflow setup + Analytics
4. **Weeks 13–16+:** Advanced Integration → Scripts + Multi-tool agents