



PROVIDED FOR PERSONAL
USE AND CREATED BY MPR
DESIGNS

AI ADJUSTMENT WORKSHEET FOR SMALL BUSINESS OWNERS

UNDERSTANDING WHAT IS CHANGING, WHAT STAYS THE SAME,
AND HOW TO DELEGATE SMARTER.

SECTION 1- WHAT IS ACTUALLY CHANGING?

Is this a platform shift? | Is this a customer behavior shift? | Is this a technology shift? | Is this a pricing shift? | Is this a visibility shift?

SECTION 2 - WHAT PART OF MY BUSINESS DOES IT AFFECT?

Marketing | Sales | Lead generation | Lead nurturing | Customer service | Client onboarding | Fulfillment | Operations | Content creation | Follow-up | Teamwork | Workflow | Scheduling | Admin work | Project management | Internal systems | Social media | Email marketing | Reporting | Financial tracking | Customer retention | *Consider other areas specific to your business or industry*

SECTION 3

WHAT NEEDS TO STAY THE SAME?

Values | Customer promise | Identity | Quality | Human touch

WHAT NEEDS TO CHANGE?

Speed | Systems | Messaging | Tools | Workflow | Expectations | Time Management | Automation | 3 Year 5 Year Outlook

SECTION 4 - HOW CAN I USE THIS TO MY ADVANTAGE?

Can this save time? | Can this improve consistency? | Can this make content easier to create? | Can this improve follow-up? | Can this help me serve my customers faster? | Can this reduce cost or waste? | Can this help me compete smarter? | Can this make me more effective? | Can this help me get some of my time back?

SECTION 5- HIGHLIGHT 2-3 PROBLEM THAT NEED SOLVED OR ARE AFFECTED.

Now that you understand what is changing, write down the 2–3 biggest problems or pressure points this shift is creating in your business.

SECTION 6 - TOOLS TO EXPLORE

List any tools, systems, or platforms you have seen, heard about, or may want to research further. This is not a final decision list — just a place to capture ideas and bookmark ideas.

SECTION 7- DELEGATION PLANNER — WHAT SHOULD BE HANDLED BY PEOPLE VS. AI?

Choose the tasks, responsibilities, or areas being affected. Then decide what should stay human-led and what can be AI/computer handled. Focus on what is best served by each and why.

	<i>What is being affected / what needs to change?</i>		
Person or Human Task Delegation	Why is this best served by people?	AI or Computer Task Delegation	Why is this best served by AI or a system?

The goal of this worksheet is to help you take a realistic approach to what needs to be handled by people and what can be handled with AI support and tools. Every business has opportunities to improve efficiency, strengthen systems, and create better use of time. This worksheet is designed to help you build an actionable plan and walk away with a clear next step. If you have questions or want help working through it, you submit questions for review and join the weekly live show, or email makayla@mprdesigns.com.