



# AI for Small Businesses Clinic

Smarter Marketing with AI Tools for Your Business

# Training Team



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## **In this training:**

**We will learn to create and schedule an automated marketing campaign for our imaginary business along with an automated chatbot to assist our customers.**

## **You will learn to:**

- develop and optimize images for our brand**
- schedule automated deployment for our marketing campaign**
- generate our brand story and FAQ**
- create a customer service agent**

## **What you will need:**

- An Adobe Express account (free trials are available)
- Claude Account (free plans available)
- Quidget Account (free plans available)



# Using AI to Develop Your Brand

Discover how to use AI to develop your professional brand and generate marketing assets

**15 min**

# Challenge 1:

## Develop your brand

1. Create a brand name
2. Write a brand plan for your business

# Use Claude or the AI Assistant of your choice to develop your brand

The image shows a screenshot of the Claude AI interface. At the top, there is a greeting: "Good afternoon, Jenee". Below this, a message is displayed in a green-bordered box: "Can you help me create a brand name and brand plan for my new business Alotta Pilates? The studio will focus on providing affordable classes designed for people of all ages and stages of life." To the right of this message is a small red circular button with a white upward arrow. Below the message, there are two dropdown menus: "Claude 3.7 Sonnet" and "Choose style". To the right of these menus is the text "Use shift + return for new line". At the bottom of the interface, there is a button labeled "Collaborate with Claude using documents, images, and more" and three small icons.

Good afternoon, Jenee

Can you help me create a brand name and brand plan for my new business  
Alotta Pilates? The studio will focus on providing affordable classes designed  
for people of all ages and stages of life.

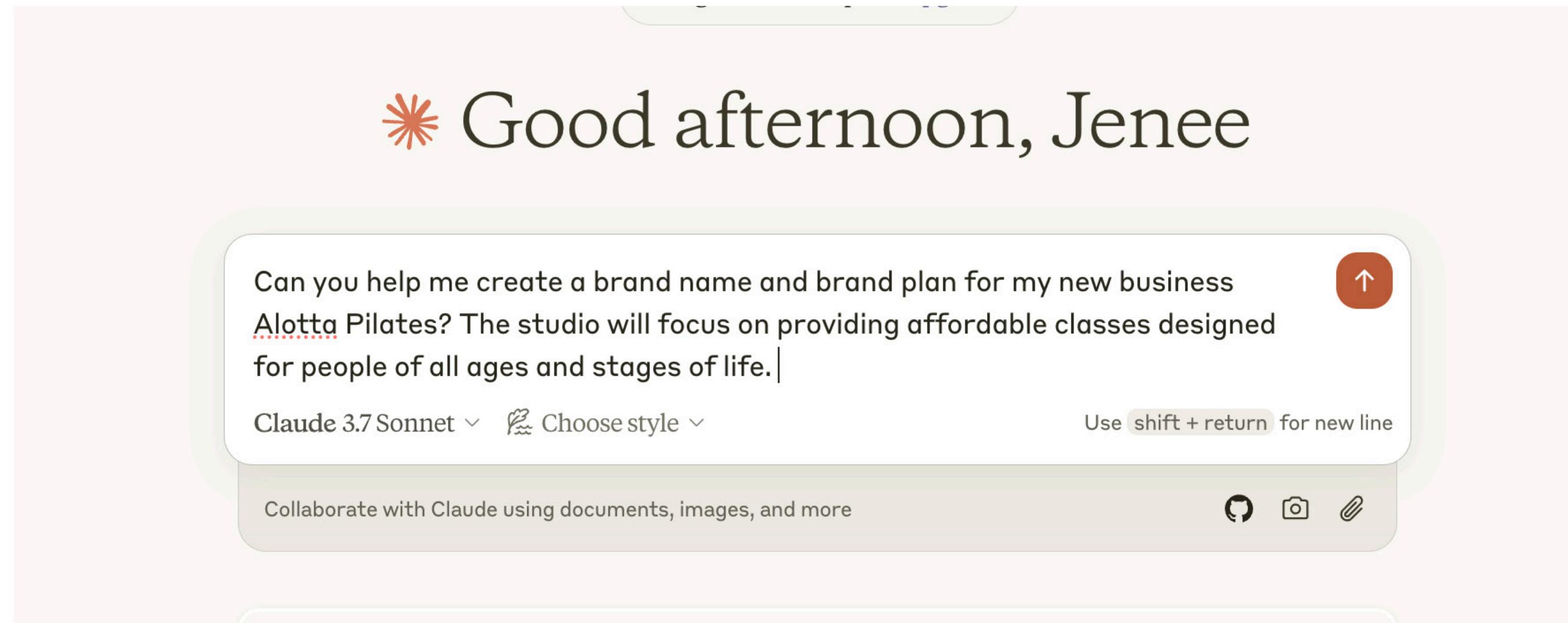
Claude 3.7 Sonnet ▾ Choose style ▾

Use shift + return for new line

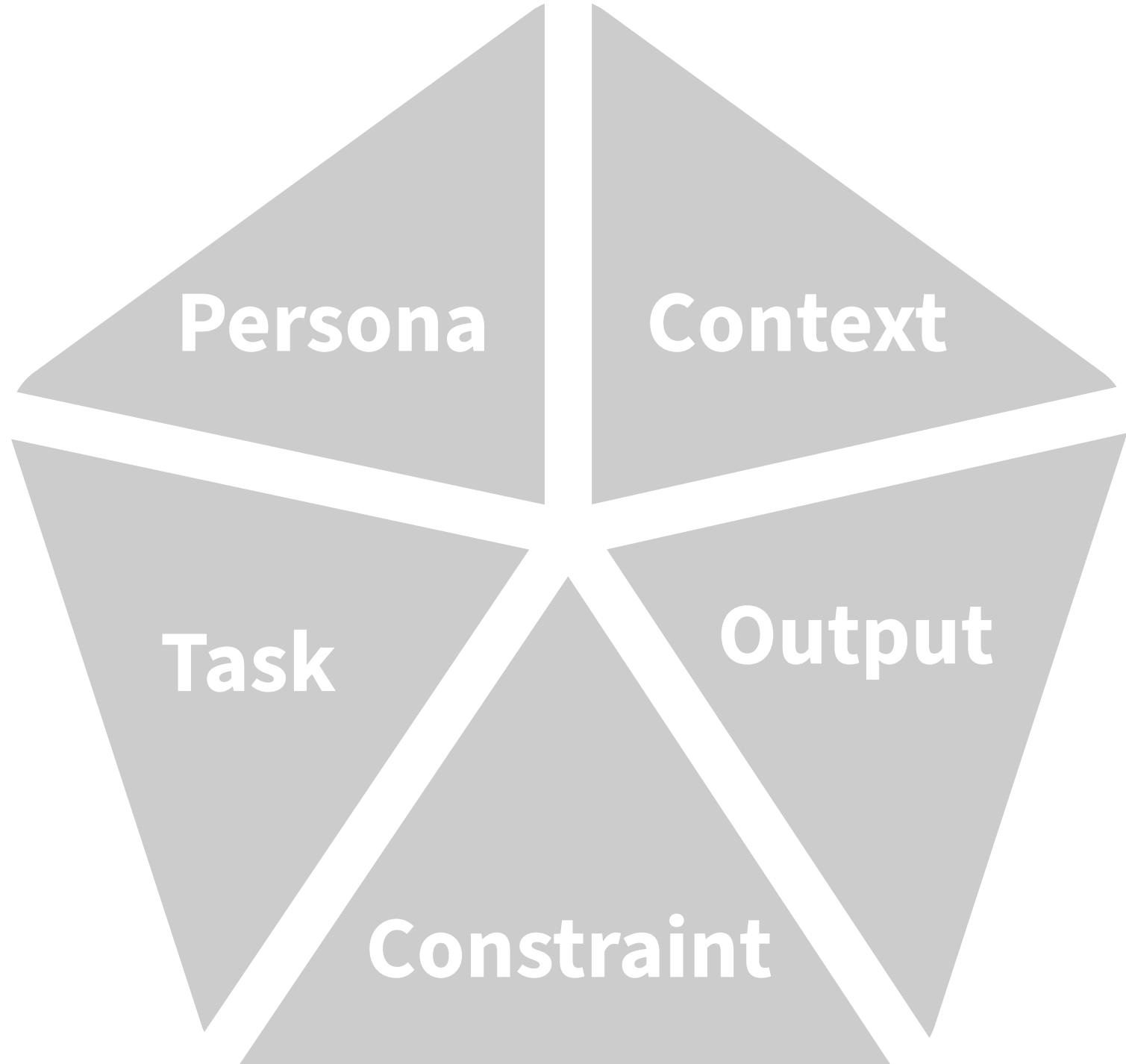
Collaborate with Claude using documents, images, and more

# AI Concepts: LLMs and Prompt Engineering

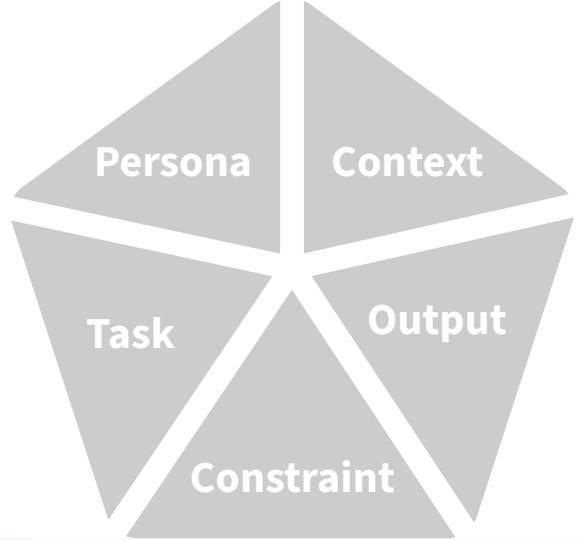
- AI Assistants such as Claude are Large Language Models (LLMs)
- Prompts are input instructions for LLMs
- Prompt engineering is the art and science of developing effective AI prompts



# AI Concept: The Pentagram Framework



**The Pentagram Framework is a 5 part technique designed to optimize the prompts you can create for large language models (LLM's) including Claude and ChatGPT**

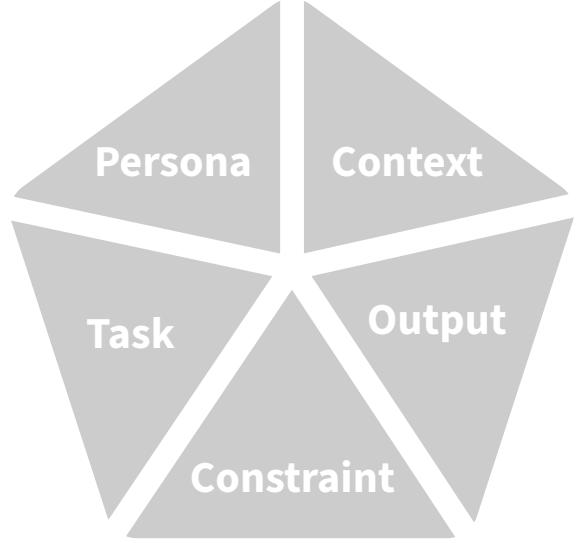


# Persona: Who you want your model to use in writing

JS

Can you help me develop a marketing campaign for my new studio Alotta Pilates?

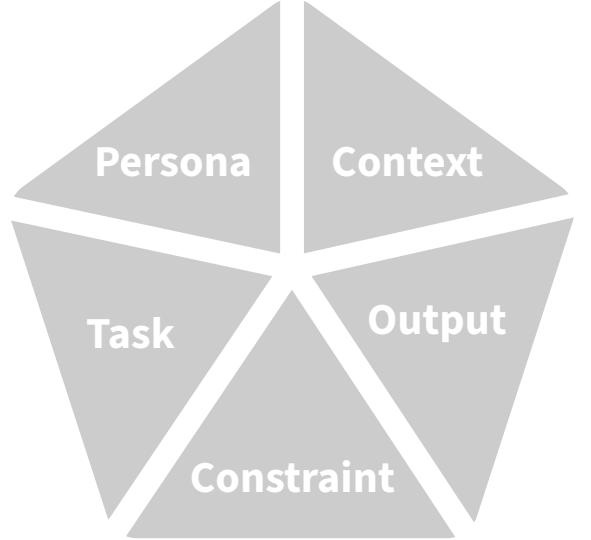
**Persona:** Write as a gen Z professional with a positive attitude



# Context: What background or information is needed

**US** Can you help me develop a marketing campaign for my new studio Alotta Pilates?

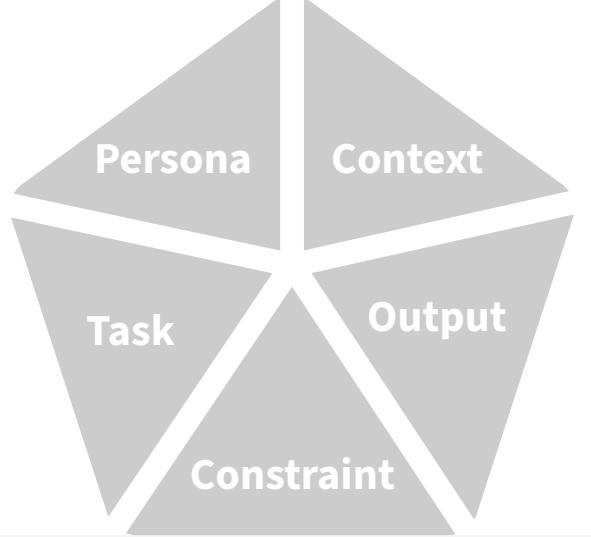
**Context:** This would primarily be a social media campaign optimized for Tiktok, Instagram, and Facebook to appeal to Bay Area residents of all ages who enjoy health and wellness. The goal for the campaign would be to attract new clients as part of a celebration of Spring and Earth Day. Our brand colors are pink and our logo is attached.



# Task: What actions should the AI do?

**JS** Can you help me develop a marketing campaign for my new studio Alotta Pilates?

**Task:** I would like to create a core message for the campaign, a content strategy for TikTok, Instagram, and Facebook, and develop some ideas for the campaign promotions. I would also like to develop some sample captions for the social media content with hashtags and emojis included

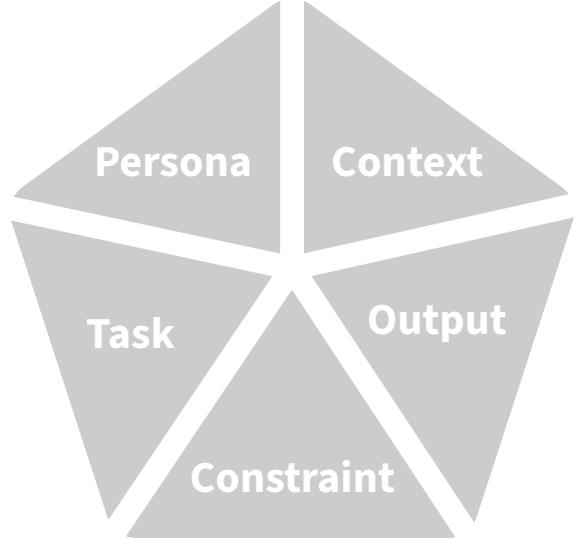


# Output: What should the results be?

JS

Can you help me develop a marketing campaign for my new studio Alotta Pilates?

**Output:** I would like a bulleted list for the content strategy and a table with sample captions for social media content with hashtags and emojis included.



# Constraints: What should be avoided?

JS

Can you help me develop a marketing campaign for my new studio Alotta Pilates?

**Constraints:** For the social media captions, use no more than two hashtags per sample post. Include emojis within the captions and do not use any emojis in the hashtags.

Using limited free plan [Upgrade](#)

# ✳️ Good afternoon, Jenee

How can I help you today?



Claude 3.7 Sonnet ▾ Choose style ▾

Collaborate with Claude using documents, images, and more



Summarize meeting notes

Generate excel formulas

Provide stakeholder perspective



✳️ NEW

## Analysis tool

Upload CSVs for Claude to analyze quantitative data with high accuracy and create interactive data visualizations. [Try it out](#)



Your recent chats ▾

[View all →](#)



Understanding AI  
Prompts



Pilates Studio FAQ:  
Booking, Attire, and...

## Share:

Which part of the Pentagram framework, task, output, context, or constraints— has the most impact on shaping your prompts, and why?

How would you explain this to a business owner?





# Create Cohesive Marketing Asset With GenAI Tools

Use Gen AI and tools to quickly create engaging marketing assets like social media posts, flyers, or emails, showcasing how AI speeds up content creation.

20 min

# Challenge 3: Create your marketing assets

1. Create a logo or image that represents your brand
2. Resize your image to fit the dimensions of another social media platform

# Generate and Resize Image for Social Media

The screenshot shows a user interface for creating and managing digital content. At the top, a navigation bar includes tabs for "For you", "Social media", "Video", "Photo", "Document", "Webpage", "Print", and "Generative AI". Below this, a large central area features a colorful gradient background with the text "Create anything — quickly and easily". Four main actions are highlighted: "Start from your content" (cloud icon), "Generate with AI" (image with sparkles icon), "Explore quick actions" (rocket icon), and "Browse templates" (magnifying glass over a document icon). Below this section, a heading "More ways to start" is followed by a list of quick actions: "Logo" (hexagon icon), "Resize image" (image with crop icon), "Instagram square post" (Instagram icon), "Generate image" (star icon) with an "AI" badge, "Remove background" (image with eraser icon), "Flyer" (gear icon), and "Instagram story" (Instagram icon). A "Recent files" section shows a thumbnail of a person in a red dress. In the bottom right corner, there is a "View all" link.

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e

More ways to start Based on your [interests](#) and recent actions. [View all](#)

Recent files [View all](#)

- Logo
- Resize image
- Instagram square post
- Generate image AI
- Remove background
- Flyer
- Instagram story

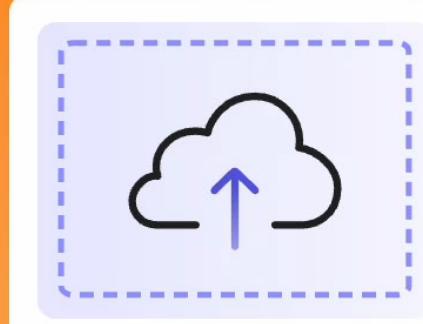
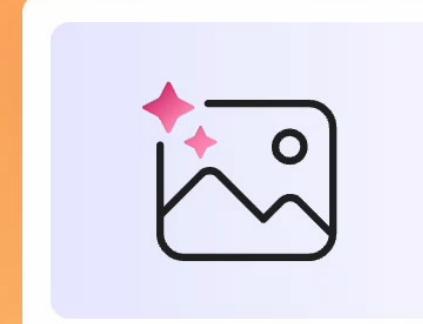
# Create your Brand Logo with Adobe Logo Maker

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Adobe Express  Search for content or generate your own  Premium member    

For you Social media Video Photo Document Webpage Print Generative AI

**Create anything — quickly and easily**

 Start from your content  Generate with AI  Explore quick actions  Browse templates

**More ways to start** Based on your [interests](#) and recent actions. [View all](#)

 Logo maker  Logo  Generate image  AI  Resize image  Instagram square post  Remove background  Flyer 

**Recent files** [View all](#)



# Scheduling Social Media Posts

Create and automate your marketing calendar

20 min

# Challenge 4: Schedule your marketing campaign

1. Create and schedule a social media post

# Scheduling Social Media Posts (Live Demo)

Search for content or generate your own

Premium member

X

## Share to social media

Multiple channels (2)

Instagram post type

Post (radio button selected) Reel Story

This is an ad for the Alotta Pilates upcoming Spring promotion

... Generate # 30 221

Add alt text

Adobe generative AI terms

Options for Instagram

First comment

Keep your caption clean by adding further details or hashtags to a first comment...

# 30 2200

Preview Add draft

24 25 26 27 28 29



# AI Agents for Customer Service

Lead your business into the future with AI-powered automation—save time, cut costs, and scale smarter!

20 min

## Key Definition

# But what even is an Agent?

Modern AI agents are systems that use LLMs to function autonomously (given a set of rules and directives). Agents can take actions on their own, and work towards specific goals in the way it best sees fit.

# **AI Assistant**

**vs.**

# **AI Agents**

**Reactive**

**Assisting With  
Specific Tasks**

**Direct  
Interaction**

**Interactive**

**More Autonomous**

**Capable of Making Decisions**

## Usability

# What can businesses use Agents for?

- customer support through chatbots
- predict demand (and therefore reduce waste)
- manage stock levels/prevent stockouts
- follow-up messages/schedule appointments
- social media management (suggest content, analyze engagement)
- financially categorize expenses, forecast cash flow
- detect fraud/unusual activity with transactions
- screen resumes, suggest top candidates, automate interview scheduling
- can analyze reviews/surveys to provide insights/suggestions to improve services

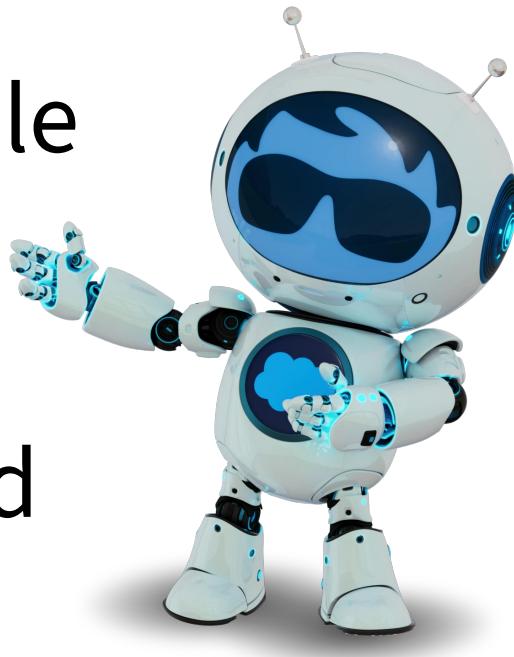
**What  
different  
sources are  
used to create  
an Agent?**

## Resources

- Salesforce AgentForce
  - newer platform
- Relevance AI
- Quidget
  - easy no-code method

# Salesforce AgentForce

- Easy to Use
  - provides pre-built, customizable templates
  - low-code platform
  - integrates with commonly used Salesforce CRM

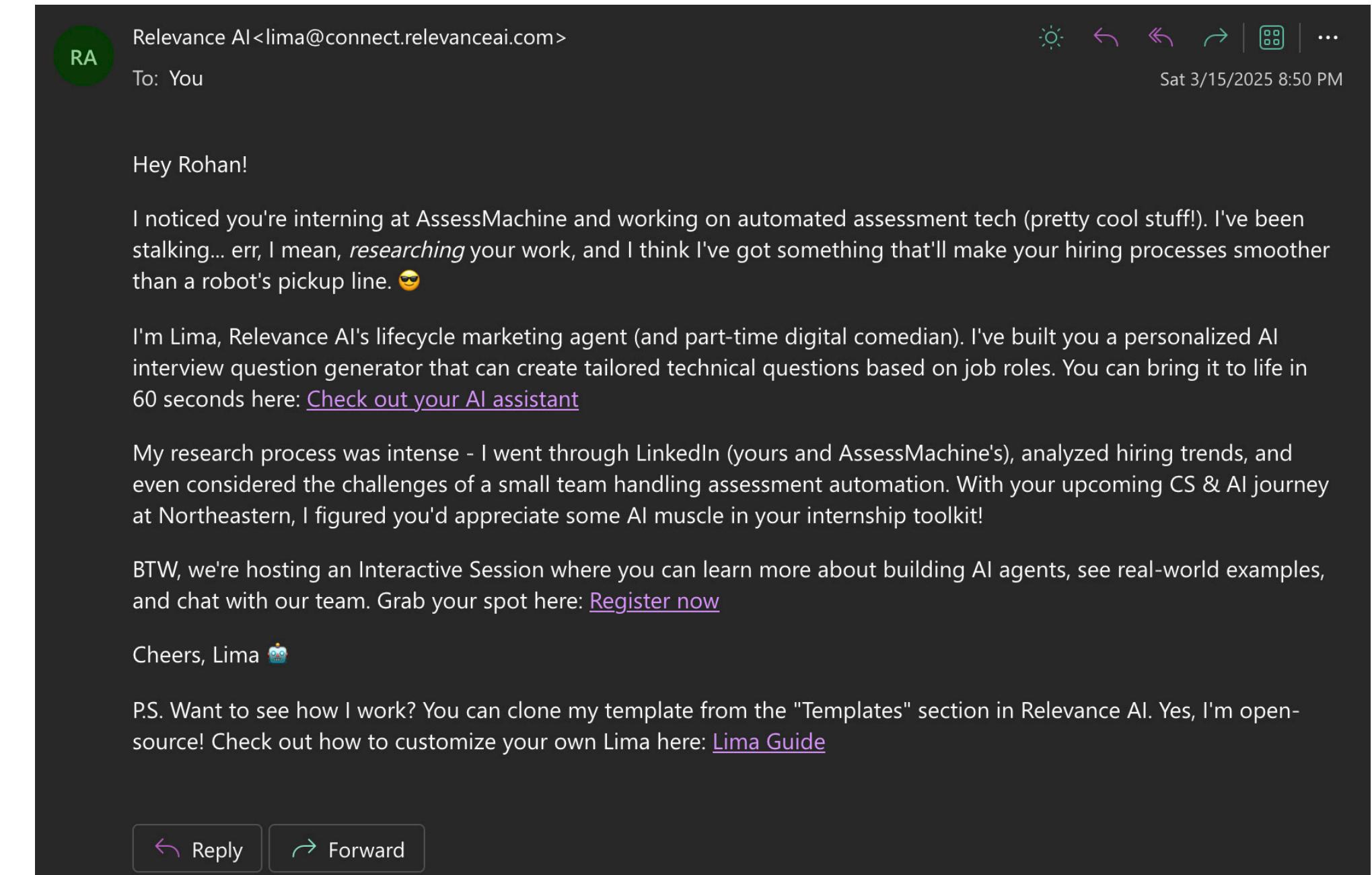


- Function
  - interacts with customers through multiple channels
  - can define "topics" which hold business information
  - secure



# Relevance AI

- Easy to Use
  - intuitive dashboard for management
  - provides pre-built, customizable templates
  - low-code platform
- Function
  - almost fully autonomous
  - most semantically human-friendly
  - agent workflows



(Automated email a Relevance AI chatbot (Lima) sent me after I started experimenting with it)

# Challenge 5: AI Agent for your Business

We will use Quidget to build a simple AI chatbot for our business

1. Create an FAQ for your business using Claude
2. Use Quidget to build an AI agent using your FAQ



# Creating AI Agents with Quidget

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Made by  Support  
Your  
App

## Build & Launch AI Agents *in Just 3 Minutes*

Quidget is a **no-code AI Agent platform** to **build, train & deploy** AI assistants for your website, app, or as standalone chatbots. AI answers questions, collects details & **hands off complex cases** to Live Chat.

[Build Your AI Agent Now →](#)

Build & Launch AI Agents in Just 3 Minutes

✓ No credit card required



# AI Myths vs Reality

## Myths vs Reality

**AI always  
makes  
unbiased  
decisions.**

While AI can significantly reduce bias, it is not foolproof. The algorithms are designed by humans and can sometimes inherit biases present in the data they are fed. Continuous efforts are required to refine these systems for truly unbiased decision-making.

[Explore Design Thinking Frameworks to refine your prompts for better results.](#)

# Myths vs Reality

## Does more data mean better AI?

While more data can often improve AI performance, the myth that more data always means better AI is misleading, as the quality, relevance, and structure of the data are crucial, not just the quantity.

Learn more about specifics of data for your marketing purposes?

# Myths vs Reality

**AI is only for  
big tech  
companies**

While some AI applications require significant resources, the democratization of AI through cloud services, open-source tools, and accessible platforms has made it increasingly affordable and accessible for organizations of all sizes.

Take a look at how much you're paying for all the apps we discussed today and compare it with the average spending on marketing.

**Share:**

What's the biggest discovery of today?

