

Course 2: AI-Powered Business Automation for SMEs

A Practical One-Day Workshop on Creating Efficiency

Course Prerequisite: Course 1: AI & Prompt Engineering for SMEs

Primary Resources:

- *AI AUTOMATION FOR SMEs: An Automation Handbook for Business Leaders*
- *GITHUB: A Guide to Modern Version Control* (as a conceptual resource)
- *Mastering the Terminal in the Age of AI: A Guide to Command Line* (as a conceptual resource)

1. Course Overview

This course is for SME leaders and operators who have mastered the basics of AI and are ready to move from simple tasks to systemic efficiency gains. We will bridge the gap between manual processes and intelligent automation. Participants will learn how to identify high-impact automation opportunities within their daily operations, from marketing and sales to finance and HR. The focus is on practical, low-code/no-code tools that allow SMEs to build powerful automated workflows without needing a team of developers. We will explore how to connect different applications, embed AI-driven decisions into workflows, and manage these new processes effectively. By the end of this workshop, attendees will have designed and partially built an automated workflow for their own business, armed with a clear roadmap for implementing AI-powered automation.

2. Learning Objectives

Upon successful completion of this course, participants will be able to:

- **Remember & Understand:**
 - Define business process automation (BPA) and its relationship with AI.
 - Explain the core concepts of APIs, webhooks, and integration platforms (e.g., Zapier, Make).
 - Recognize the value of version control (as outlined in the GitHub guide) for managing automation workflows.
- **Apply:**
 - Use a structured framework to identify and prioritize business processes suitable for automation.
 - Build a multi-step automated workflow using a tool like Zapier that integrates at least two applications and one AI model.

- Incorporate prompts (developed in Course 1) into an automated workflow to perform tasks like categorizing emails or drafting responses.
- **Analyze:**
 - Map an existing manual business process and break it down into automatable steps.
 - Compare different automation tools based on features, pricing, and suitability for specific SME needs.
- **Evaluate & Create:**
 - Assess the potential ROI of an automation project.
 - Design a complete automation plan for a core business process, including triggers, actions, logic, and error handling.
 - Create a simple "version log" for their automation to track changes and improvements.

3. Course Schedule & Modules

Total Duration: 8 hours (including breaks)

Time	Module	Topics & Sub-topics	Trainer Activity	Trainee Activity
9:00 - 9:45	Module 1: The Automation Mindset	- Welcome & Recap of Course 1- From Manual Tasks to Automated Systems- The Automation Spectrum: From simple rules to AI-driven decisions	- Facilitate discussion on Course 1 takeaways- Present case studies of SME automation success - Introduce the concept of "if this, then that" logic	- Share one task they successfully used AI for after the Course 1 Group discussion: "What are our most repetitive tasks?"
9:45 - 11:00	Module 2: Identifying Opportunities	- Framework for Automation: The Effort vs. Impact Matrix- Common SME Use Cases: Lead nurturing, invoice processing, social media management,	- Introduce the Effort/Impact matrix- Walk through examples for each business function- Provide a worksheet for	- Activity: Individually, brainstorm and plot at least 5 business processes on the Effort/Impact matrix. Select one

		customer onboarding- Activity: Your Automation Hit List	process identification	"high-impact, low-effort" process to focus on for the day.
11:00 - 11:15 Coffee Break				
11:15 - 12:30	Module 3: The Automation Toolkit	- How it Works: APIs & Webhooks explained simply- Intro to Integration Platforms: Zapier/Make deep dive- Connecting AI: Integrating OpenAI/Claude into workflows	- Use analogies to explain APIs (e.g., a waiter)- Live demo: Building a simple 2-step "Zap" (e.g., save Gmail attachment to Google Drive)- Show how to add an AI action	- Follow the live demo on their own Zapier accounts- Replicate the simple Zap shown by the trainer
12:30 - 13:30 Lunch Break				
13:30 - 15:00	Module 4: Hands-on Lab: Build Your First AI Workflow	- Project: Automate the selected process from Module 2- Step 1: Define the Trigger- Step 2: Add Actions & Logic- Step 3: Inject an AI-powered step (e.g., summarize, categorize, draft)	- Act as a facilitator, moving between participants/groups- Provide one-on-one guidance and troubleshooting- Showcase a few common patterns on the main screen	- Activity: Guided, hands-on session. Each participant builds their own workflow (e.g., "When a new lead comes from a form, send the info to a ChatGPT prompt to draft a personalized outreach email, then create a draft in Gmail").
15:00 - 15:15 Coffee Break				
15:15 - 16:30	Module 5: Managing & Scaling Your Automations	- Testing & Debugging: What to do when it breaks- Documentation & Versioning: Why <i>Mastering the</i>	- Demonstrate common errors in Zapier and how to fix them- Introduce a simple template	- Test their workflow from Module 4- Activity: Document their workflow using the

		Terminal and GitHub concepts matter (tracking changes)- Thinking in Systems: Connecting multiple workflows	for documenting a workflow- Explain the concept of a "Changelog" for automations	provided template. Add a "v1.0" note.
16:30 - 17:00	Module 6: Wrap-up & Automation Roadmap	- Show & Tell: 2-3 volunteers demo their workflow- Security & Cost Considerations- Your 30-Day Automation Plan	- Facilitate the Show & Tell session- Lead a discussion on best practices for security- Summarize key takeaways	- Share their work (optional)- Draft a plan to implement their first workflow and identify the next two to tackle.

4. Resources & Materials

- **Primary Reading:** *AI AUTOMATION FOR SMEs: An Automation Handbook for Business Leaders.*
- **Conceptual Reading:** *GITHUB: A Guide to Modern Version Control, Mastering the Terminal in the Age of AI.*
- **Hardware:** Participants must bring their own laptops.
- **Software/Accounts:** Pre-registered accounts for Zapier (free tier is sufficient) and the AI tools from Course 1. Access to their own business software (e.g., Gmail, Google Sheets, Slack, CRM) is highly recommended.
- **Handouts:**
 - Effort vs. Impact Matrix worksheet.
 - Workflow Design & Documentation template.
 - Checklist for Testing Automations.