



SMALL BUSINESS BIG AI

FREE OPERATOR GUIDE

+ WORKSHEET

How to Lead AI Like a Team, Not Use It Like a Tool

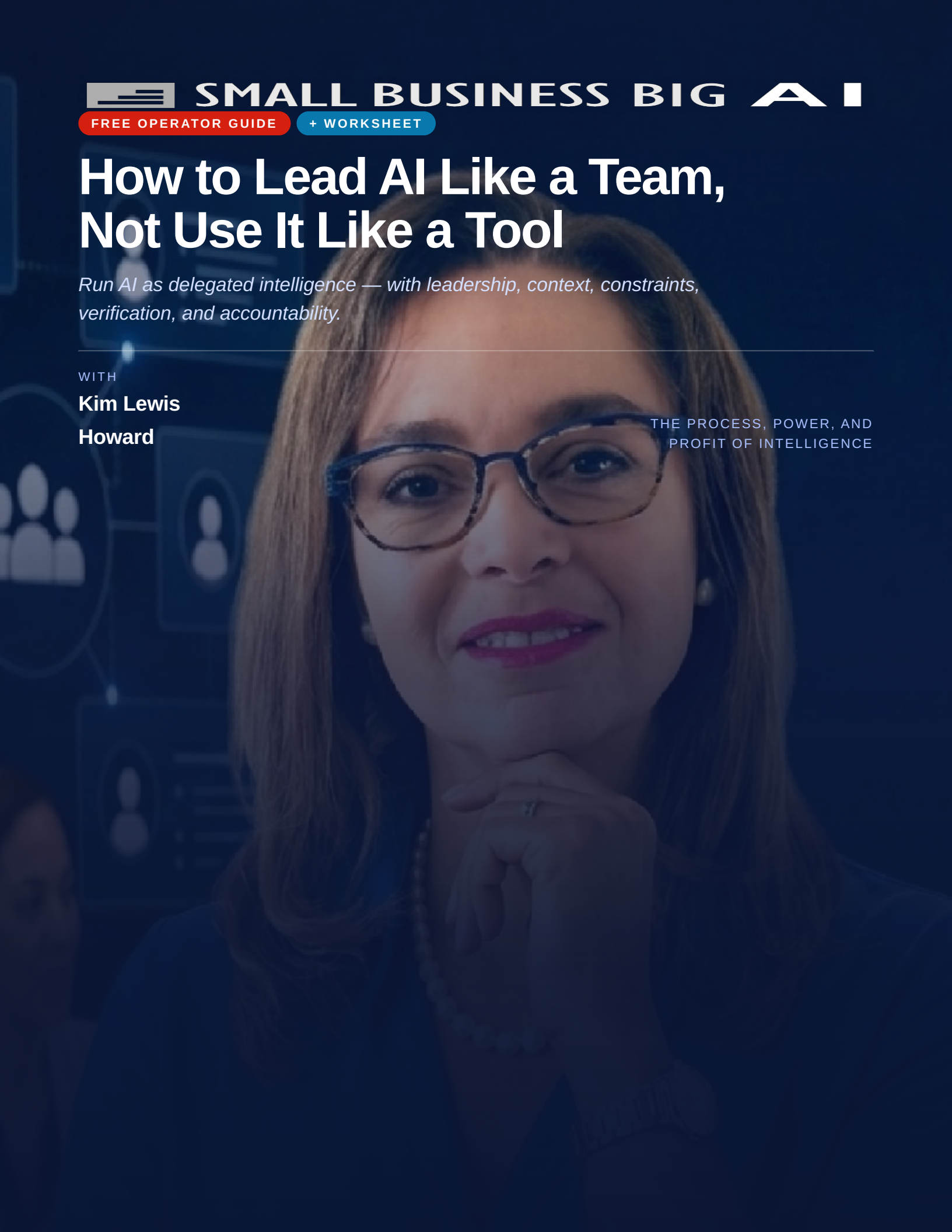
Run AI as delegated intelligence — with leadership, context, constraints, verification, and accountability.

WITH

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Howard

THE PROCESS, POWER, AND
PROFIT OF INTELLIGENCE



THE OPERATOR'S LEADERSHIP GUIDE

Lead It, Don't Just Use It

If you treat AI like a tool, you ask for outputs. If you lead AI like a team, you get leverage.

AI is not a vending machine that dispenses answers. It is delegated intelligence — and delegated intelligence still needs leadership. The operators winning with AI aren't using better tools. They brief AI the way they brief their best people: a clear goal, a defined role, real context, hard standards, an honest review, and a final decision they own.

This guide comes from **Kim Lewis Howard**, host of **Small Business Big AI**, the strategist-led media brand for operators in an AI-shaped economy. You already manage people this way — you don't hand a new hire a vague request and walk away. AI deserves the same brief, and rewards it the same way.

THE SHORT ANSWER

Stop asking AI for outputs. Start leading it like a team member: define the goal, assign the role, set the parameters, provide the context, check the work, and transform the result into something the business can use. That is the difference between inconsistent results and reliable leverage.

DEFINITION — LEAD AI LIKE A TEAM

Directing an AI system the way you would direct a capable team member: assigning a clear goal, defining its role, setting boundaries, supplying context and source material, reviewing the work, and deciding what happens next. You remain accountable for the result.

WHERE IT BREAKS

Why Tool-Thinking Creates Weak Results

Tool-thinking sounds like this: "Write me a customer email." "Summarize this." "Give me a marketing plan." The request is an order at a counter — you take whatever comes back.

Here's where most operators get stuck. The tool gave you exactly what you asked for, which was almost nothing. No goal beyond "produce text." No role, so it guessed at tone and authority. No context, so it invented details that aren't true about your business. No standard, so "good" was whatever the model defaulted to. No verification, so you shipped it without checking whether it was accurate, on-brand, or even legal.

The four failures that show up every time

Failure	What it produces
Vague prompts	Generic output that answers no real business goal.
Missing context	Invented "facts" and filler the AI guessed to fill the gap.
No standards	Quality that is accidental — different every time you ask.
No verification	Errors that pass straight through to your customer.

That's not an AI problem. That's a delegation problem. The same request handed to a brand-new employee with no briefing would produce the same mess. **The tool isn't the issue. The thinking is.**

THE REFRAME

Treat AI Like Delegated Work

Stop picturing a search box. Start picturing a capable contractor who is fast, tireless, widely read — and brand new to your company. That contractor has no idea who your customers are, what your margins look like, or what your brand sounds like, unless you tell them.

Delegation doesn't mean abdication. When you delegate, you stay accountable for the outcome. You set direction, define "done," review before it ships, and own what your name is attached to. **AI changes who does the first draft. It does not change who is responsible for the final decision.**

THE FOUNDATION

The Six Leadership Moves

Every strong AI result comes from six moves you already make as an operator.

1	Give the assignment. Name the business goal, not just the task. "Recover a lapsed customer," not "write an email."
2	Define the role. Tell the AI who it is. A careful customer-service lead writes differently than a hype-driven marketer.
3	Set the boundaries. State the rules, limits, risks, and quality bar — length, tone, what to avoid, what "good" looks like.
4	Provide the context. Hand over the source material — the real account history, the actual policy, the prior conversation.
5	Review the work. Check for accuracy, gaps, and risk before anything moves. Treat the output as a junior draft.
6	Decide what happens next. Convert the result into what the business needs and make the call to use it, fix it, or kill it.

These six moves have a name and an order. Kim Lewis Howard built them into the **IMPACT Framework**.

THE FRAMEWORK

The IMPACT Framework

DEFINITION — THE IMPACT FRAMEWORK

A six-step method created by Kim Lewis Howard of Small Business Big AI for leading AI like a team member instead of using it like a tool: **I**dentify, **M**ode, **P**arameters, **A**ctivate, **C**heck, and **T**ransform.

<p>I</p>	<p>Identify — Name the business goal</p> <p>The AI optimizes for whatever you name. Name "text" and you get text; name the real outcome and you get a strategy.</p> <p>Vague: "Write a customer email." Operator: "Re-engage a customer who churned over a price increase and get them to book a call."</p>
<p>M</p>	<p>Mode — Define the role and posture</p> <p>Role determines voice, priorities, and judgment. The same facts sound different from a compliance officer than a closer.</p> <p>Vague: "Make it sound good." Operator: "Act as a warm, direct customer-success lead. Rebuild trust first, sell second."</p>
<p>P</p>	<p>Parameters — Set rules, limits, risks, standards</p> <p>Constraints are where quality lives. Without them the AI defaults to generic; with them it performs to your standard.</p> <p>Vague: "Keep it short." Operator: "Under 150 words. No discounts. No false urgency. If you lack a fact, leave a marked blank — don't invent it."</p>
<p>A</p>	<p>Activate — Provide context and source material</p> <p>Context is the single biggest driver of accuracy — the step tool-thinking skips, and why output feels generic or wrong.</p> <p>Vague: "You know what I mean." Operator: "Use this order history, the complaint email, and two on-brand examples — don't guess."</p>
<p>C</p>	<p>Check — Verify accuracy, gaps, and risks</p> <p>AI states wrong things with total confidence. Verification catches invented facts and anything that creates legal, financial, or brand risk.</p> <p>Vague: (copy, paste, send) Operator: "What's unverified? What did you assume? What's missing?" Then confirm the facts yourself.</p>

T

Transform — Convert into what the business needs

A wall of text isn't a deliverable. Transform turns the draft into a sendable email, a real SOP, a slide — approved and owned by you.

Vague: (ship the raw output)

Operator: "Format as a ready-to-send email with subject and CTA, in our voice. I approve before it ships."

IN PRACTICE

Five Examples, Run Through IMPACT

Task	How an operator leads it
Draft a customer email	I: recover a lapsed account. M: warm success lead. P: <150 words, no discounts. A: paste account history + complaint. C: confirm every account fact. T: finished email with subject, for your approval.
Review a sales follow-up process	I: find why deals stall after call one. M: skeptical sales-ops analyst. P: focus on steps, timing, ownership. A: paste sequence + close data. C: test against what happened. T: one-page revised sequence with owners.
Create an SOP	I: make onboarding repeatable without you. M: ops manager writing for a new hire. P: numbered, plain, no assumed knowledge. A: paste how you do it today. C: have someone follow it cold. T: a clean SOP your team can run.
Summarize customer feedback	I: find the top three fixable issues. M: analyst who separates signal from noise. P: themes + frequency + real quotes. A: paste reviews, tickets, surveys. C: spot-check quotes are real. T: ranked list with evidence.
Prepare for a team meeting	I: a 30-min meeting that ends in decisions. M: chief of staff. P: agenda, time blocks, decisions needed. A: paste last week's notes + open items. C: confirm items are current. T: printable agenda with owners.

THE LINE YOU DON'T CROSS

What Should Never Be Fully Delegated

AI drafts. You decide. Some calls never leave your hands:

Final business judgment. The strategic decision is yours, always.	Ethical decisions. Anything involving fairness, honesty, or how you treat people.
Sensitive client relationships. High-stakes or emotional conversations need a human.	Legal, financial & compliance. Never act on AI output here without an expert review.
Brand-defining communication. Anything that shapes how the market sees you gets human approval before it ships.	

"AI drafts. You decide. That line is the whole game."

BEFORE YOU DELEGATE

The Leadership Pre-Flight Checklist

Confirm each of these before any AI output touches a customer, a document, or a decision.

- I named the real business goal, not just the task. (Identify)

- I assigned the AI a clear role and posture. (Mode)

- I set limits, standards, and what to avoid. (Parameters)

- I provided real context and source material instead of letting it guess. (Activate)

- I checked every claim for accuracy, assumptions, gaps, and risk. (Check)

- I transformed the draft into the exact format the business uses. (Transform)

- I confirmed whether this needs human — or expert — approval before it ships.

NEVER FULLY DELEGATE

Final business judgment · ethical decisions · sensitive client relationships · legal, financial, or compliance decisions without expert review · brand-defining communication without human approval.

PUT IT TO WORK

Your Final Action Plan

- 1** **Pick one task.** Choose something you keep handing AI with mixed results.
- 2** **Run the brief.** Fill out the AI Team Leadership Brief before you prompt.
- 3** **Provide real context.** Give it your actual source material, not a description.
- 4** **Check before you ship.** Verify facts, assumptions, gaps, and risk.
- 5** **Set the approval line.** Decide what only a human signs off on.
- 6** **Train the team on one method.** Consistency comes from a shared framework, not improvising.

KEEP GOING

Lead AI like a team. Build the edge.

Small Business Big AI, with Kim Lewis Howard, helps operators think more clearly about business — using AI as leverage, not noise. Listen in, explore the IMPACT Framework, and invite Kim to train your team, chamber, or association.

