

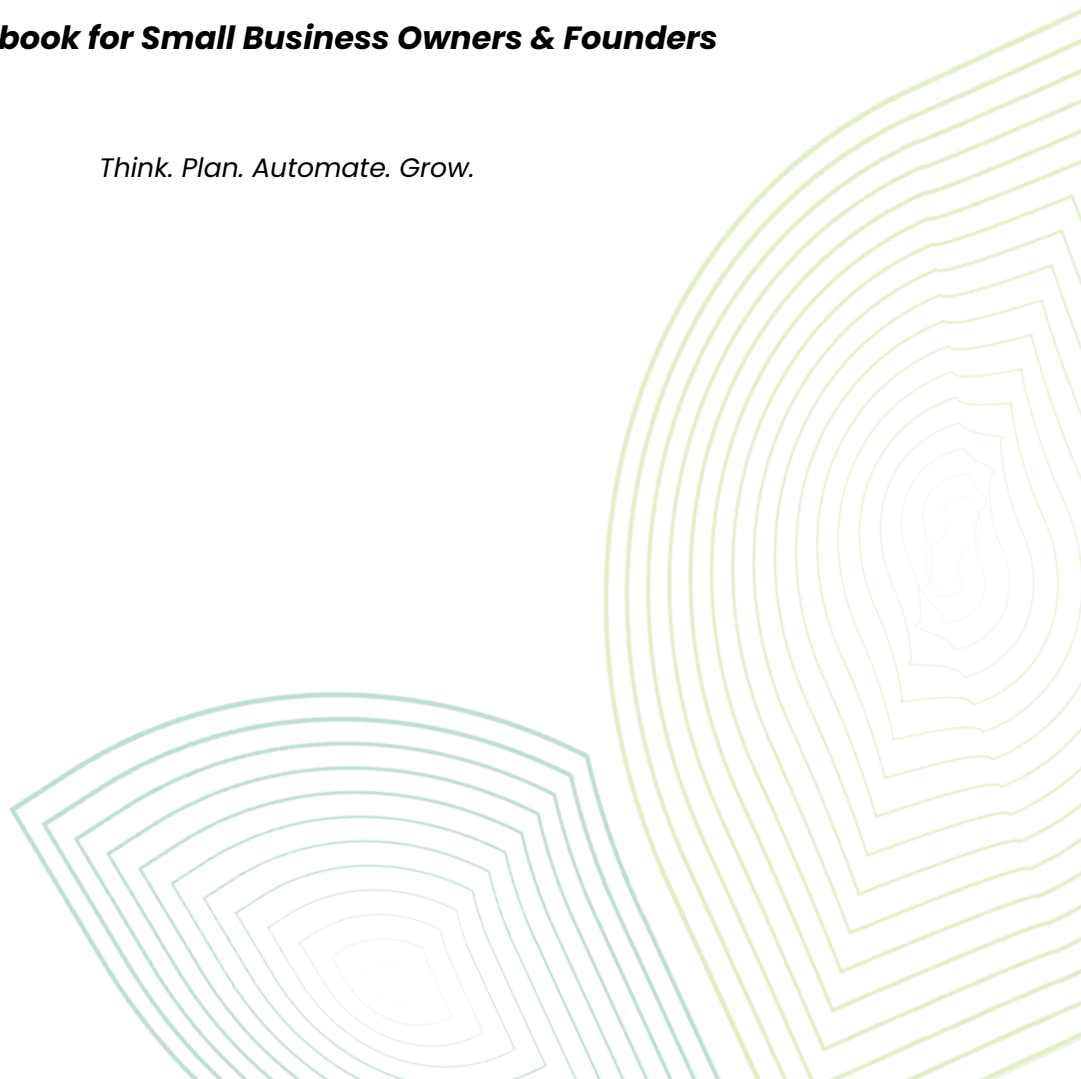


Business So Far: Maximizing the Last Quarter with AI

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Q4 Workbook for Small Business Owners & Founders

Think. Plan. Automate. Grow.



How to Use This Workbook

This workbook is your 90-day action guide. Fill it in during the session. Use it to track your Q4 goals, plan campaigns, and identify where AI can help.

My Q4 Snapshot

1. My Business: _____
2. Industry: _____
3. My Top 3 Goals This Quarter:
 1. _____
 2. _____
 3. _____
4. What success looks like for me in December:

Marketing & Visibility Audit

Where am I visible right now?

☐ Website ☐ Google Business ☐ Facebook ☐ Instagram ☐ LinkedIn ☐ WhatsApp Business ☐ TikTok

What's working well: _____

What's not working: _____

This quarter I need to show up more on: _____

Know Your Customer

Who am I targeting this quarter?

Describe in one line: _____

What do they care about right now? _____

Where do they spend most of their time online?

☐ Instagram ☐ WhatsApp ☐ Facebook ☐ LinkedIn ☐ X ☐ In-person

What problems do I solve for them? _____

My Q4 Campaign Ideas

Use this table to brainstorm your campaigns.

Idea | Target Customer | Channel | When to Launch | Resources Needed

_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____



My AI Quick Wins

Which 3 tasks take too much of my time?

1. _____
2. _____
3. _____

How could AI or automation help?

1. _____
2. _____
3. _____

Tool I'll try first: _____

Why it matters: _____

Scaling & Systems

If my business doubled next month, what would break first?

System or process I'll document this quarter:

Who can help me or take over this task:

One process I'll automate or delegate before December:

Data & Reflection

What data do I already have?

☐ Sales data ☐ Customer contacts ☐ Social insights ☐ Website analytics

What's one insight I've learned from my data so far?

New metric I'll track in Q4:

My Action Plan

My Top 3 Q4 Actions:

1. _____
2. _____
3. _____

Deadlines:

1. _____
2. _____
3. _____

Tools or People I'll Use:

Success Measure:



Accountability & Follow-Up

Who will keep me accountable?

☐ Business buddy ☐ Mentor ☐ Team member ☐ Savannah Syndicate Group

When I'll check progress:

☐ Weekly ☐ Monthly ☐ End of Q4

One thing I'll share in the group after this session:

AI Tools Cheat Sheet

Tool	Purpose	Link
ChatGPT	Content & ideas	chat.openai.com
Canva	Design & visuals	canva.com
Grammarly	Polished writing	grammarly.com
Lumen5	Quick videos	lumen5.com
ManyChat	Chatbots	manychat.com
Google Analytics	Track performance	analytics.google.com

Reflection

What worked this quarter? -----

What didn't? -----

What will I do differently in Q1? -----

How will I keep learning about AI and digital strategy? -----

