HILOVIVO

MANUAL

AI Manual for Small Businesses

So artificial intelligence saves you work without making your life more complicated.

By **HILOVIVO**

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INTRODUCTION

How to use this manual

This manual is for you if you run a small business (3 to 5 people, such as a hair salon, a laundry or a recruitment agency) and want artificial intelligence (AI) to save you work without making your life more complicated.

You don't need to be tech-savvy. Each section is short and ends with something you can do this very week. If you only have 10 minutes, read section 3 (where to start) and the checklist in section 9.

SECTION 1

1. What AI can and can't do for your business

When we talk about AI here, we mainly mean assistants that understand and write text (chatbots, or "language models") and the tools that use them behind the scenes: booking systems, invoicing software, social media managers and so on.

What it does well

- **Writing drafts**: replies to customers, quotes, social media posts, emails, job ads.
- **Summarising and organising**: turning loose notes, voice messages or long emails into a clear to-do list.
- **Answering repeat questions**: opening hours, prices, where you are, how to book.
- **Remembering things**: appointments, outstanding payments, renewals, pickups.
- **Translating and adjusting tone**: serving customers who speak another language, or making a text friendlier or more formal.
- **Filling in templates**: preparing a document in your usual format from just a few details.

What it doesn't do (or shouldn't do on its own)

- **It doesn't know what you don't tell it.** It doesn't know your prices, hours or policies unless you give them to it in writing.
- **It makes mistakes with confidence.** It can invent a fact, a date or a price and state it with complete conviction. That's why anything going out to a customer should be checked by a person, at least at first.
- **It doesn't decide for you.** Hiring someone, turning down a customer, applying a discount or chasing a debt are your decisions.

- **It doesn’t replace the personal touch.** What it does is take repetitive work off your plate so you have more time for that personal touch.
- **It isn’t a legal, tax or medical adviser.** Use it to prepare your questions, not to get final answers on those topics.

Golden rule: AI prepares, a person reviews and decides. Once a task has been going well for weeks, you can give it more autonomy, but always with an easy way to check what it’s doing.

THIS WEEK

write down three tasks you repeat every day and don’t enjoy. We’ll use them in section 4.

SECTION 2

2. The method: build your digital business alongside your physical one

The Exponential Organizations (ExO) method doesn't ask you to change your business overnight. It suggests building a new version alongside the one that already works. You test it in parallel first and, once it proves itself, gradually shift work over to it. That digital version is your **digital twin**.

1. **Define your purpose.** One sentence that says why your business exists, beyond what it sells. For example: "Every customer leaves feeling better than when they came in."
2. **Create the digital twin.** Put it in writing so the AI can understand it: your services, prices, hours, policies, customers and the way you do things. That way it works with your real information instead of making it up.
3. **Test it in parallel.** For a few weeks, the twin does the work and you make decisions as usual: it proposes replies, appointments and reminders, and you review them and compare them with what you would have done.
4. **Hand over work gradually.** When a task keeps coming out right, let it run on its own and review only the exceptions. Start with repetitive work, such as appointments and reminders, then move on to payments, invoices and social media.
5. **Measure and improve.** A simple dashboard with appointments, cancellations, payments and time saved. Every week, test one small improvement and keep what works.

Your physical business doesn't go away. The relationship with your customers is still yours; what moves to the digital twin is the repetitive work.

Inspiration: this manual is inspired by the Exponential Organizations (ExO) method of Salim Ismail and his co-authors, adapted for small businesses and explained in our own words. You'll find the books under "Further reading".

The 10 ExO attributes in a small business

The examples are illustrative. Navaja Barbershop is a fictional business.

EXTERNAL

Attribute	What it means in a small business	Example (Navaja Barbershop or a laundry)
Staff on demand	Freelancers for busy periods, without adding permanent staff	Navaja Barbershop: a freelance barber on Saturdays and in December
Community	Loyal customers who form a community: WhatsApp group, referrals, reviews	Laundry: a WhatsApp group with regular customers who have signed up, plus Google reviews
Algorithms	AI handles the repetitive work	Navaja Barbershop: the assistant confirms appointments and sends a reminder the day before
Leveraged assets	Use what already exists: Booksy, WhatsApp, Canva, Claude	Navaja Barbershop: bookings on Booksy and seasonal posters made in Canva
Engagement	Challenges, loyalty rewards and prize draws to bring customers back	Laundry: a loyalty card with one free wash for every ten

INTERNAL

Attribute	What it means in a small business	Example (Navaja Barbershop or a laundry)
Interfaces	Clear processes: how a booking comes in and what happens next	Navaja Barbershop: the booking comes in via WhatsApp, is confirmed and reminded, and a review is requested after the cut
Dashboards	A few numbers in plain sight: appointments, cancellations, payments, time saved	Navaja Barbershop: every Monday, one sheet with the previous week's four numbers
Experimentation	One small improvement a week	Laundry: test the automatic "order ready" message and see whether orders get picked up sooner
Autonomy	The team decides within clear rules	Navaja Barbershop: any barber can move an appointment or resolve a simple complaint without waiting for the owner
Social technologies	One team channel instead of scattered emails	Laundry: a single team group for shifts, incidents and announcements

SECTION 3

3. Where to start: quick wins

Start with tasks that meet three conditions: they come up a lot, little is at risk if something goes wrong, and it's easy to tell whether they've been done right.

3.1 Customer messages

- Prepare a document with the answers to the 10–15 questions you get asked most (hours, prices, address, parking, payment methods, turnaround times).
- Ask the assistant to draft replies using only that information. Sample instruction: *"Reply to this customer message in a friendly, brief tone. Use only the information in this document. If the answer isn't there, say you'll check and get back to them today."*
- At first, copy and review every reply before sending it.

3.2 Appointments and reminders

This is one of the highest-return uses for businesses that run on bookings (hair salons, beauty centres, repair shops, small clinics, consultancies).

- A system that confirms the appointment when it's booked and sends a reminder the day before, with the option to cancel or reschedule.
- If a customer cancels, the system can alert you so you can offer the slot to someone else.
- What matters: the customer has agreed to receive these messages and can stop them whenever they want.

3.3 Quotes

- Create a quote template with your services and prices.
- Dictate or type what the customer has asked for and have the assistant fill in the template.
- Always check prices, quantities and taxes before sending it.

3.4 Invoices and admin

- Friendly, staged payment reminders (before the due date, on the due date, one week later).
- Organising supplier receipts and invoices for your accountant.
- Weekly summary: revenue, appointments, cancellations, outstanding payments.
- Official invoices must be issued through your invoicing software or your accountant; AI helps prepare and check, not replace those systems.

3.5 Social media and marketing content

- Ideas for the month's posts based on your calendar (seasons, local holidays, what's new).
- Several versions of the same text for Instagram, Google Business or WhatsApp.
- Replies to reviews, especially negative ones: ask for a calm draft and review it yourself.

- Don’t post photos of customers without their permission, even if AI helps you edit them.

3.6 Internal documents

- Turning “how we do things here” into short guides: opening and closing, how to handle a complaint, how to use machine X.
- Preparing onboarding for a new team member.
- Cleaning up meeting notes or voice messages into a to-do list with an owner for each task.

THIS WEEK

pick just one quick win from this list and try it for five days.

SECTION 4

4. A step-by-step method for building an AI-centred business

An "AI-centred" business isn't the one with the most tools; it's the one that reviews how it works and uses AI wherever it saves time or improves service, with one person in charge and measured results. This method is designed to be done without consultants and without stopping the business.

Step 1. Map your processes (1–2 hours)

Make a simple list of what happens in your business, from the moment a customer finds you until they pay and come back. For each step, note:

Step	Who does it	Time spent per week (your estimate)	Tool used today	What usually goes wrong
Customer books an appointment				
Appointment reminder				
Payment				
Follow-up / getting them back				

It doesn't need to be precise: an honest estimate is enough.

Step 2. Pick 1 or 2 use cases, no more

Score each step from 1 to 3 on these four questions and keep the ones with the highest totals:

1. Does it come up a lot?
2. Does it eat up my time or cause errors?
3. Is the risk low if the AI gets it wrong?
4. Can I easily tell whether it's been done right?

If a use case involves sensitive data or decisions about people (for example, screening candidates), leave it for later or do it with extra safeguards (section 6).

Step 3. Decide how you'll measure

Before you start, write down where the task stands today. Choose one or two simple indicators:

- Weekly time spent on the task.
- Appointments where the customer doesn't show up.
- Messages still unanswered at the end of the day.

- Days it takes you to get paid.
- Errors in quotes or invoices.

Measure it for a week beforehand and then every week. Without a baseline, you won't know whether AI is helping.

Step 4. Small pilot (2–4 weeks)

- Start with one person, one service or one type of message.
- Write the assistant's instructions in a shared document so the whole team uses the same ones.
- Review everything that goes out to customers.
- Keep a list of mistakes: it will help you improve the instructions.

Step 5. Decide: continue, adjust or drop it

At the end of the pilot, compare against your baseline and also ask the team and a trusted customer or two. Three possible outcomes:

- **Continue and expand**: it works and the team uses it.
- **Adjust**: it partly works; change the instructions or the tool and repeat.
- **Drop it**: it doesn't add value. Dropping it is also a good outcome: you've learned cheaply.

Step 6. Scale calmly

Only once the first use case works should you move on to the next one on your list. One well-established use case is worth more than five half-done ones.

Step 7. Appoint someone in charge

One person on the team (it can be the owner) takes care of:

- Keeping instructions and information up to date (prices, hours, services).
- Reviewing once a week what the AI has done and any mistakes.
- Keeping an eye on the tools' monthly spend.
- Being the go-to person for the team's questions.

They don't need to know how to code; they need to know the business well and have 30–60 minutes a week.

> **Signs you're on the right track:** the team uses the tool without being reminded, customers don't notice errors, and you have a figure of your own (measured by you) that has improved.

SECTION 5

5. Practical examples by sector

The examples are illustrative: adapt each idea to your business and measure your own results.

5.1 Hair salon or barbershop

Task	How AI helps	What the person checks
Booking and changing appointments via WhatsApp	The system suggests free slots, confirms and sends a reminder the day before	That the calendar is up to date; special cases (long colour treatments, weddings)
Slots freed by cancellations	Alert to the team or to a waiting list of customers who have asked for it	Who gets offered the slot first
Frequently asked questions	Answers with real prices and hours	Changes to prices or opening hours
Social media	Ideas and copy for seasonal posts	Photos only with the customer's permission
Customer loyalty	A message reminding customers who have opted in that they're "due for a cut"	Frequency: don't overdo it

Be careful with: notes about allergies or skin problems. That's health data: don't paste it into general-purpose assistants (section 6).

5.2 Laundry

Task	How AI helps	What the person checks
"Order ready for pickup" notice	Automatic message when the service is finished	That the order really is ready
Home pickup and delivery	Confirming the time slot and sending a reminder	Routes and last-minute changes
Questions about garments and prices	Answers based on your list of services and rates	Delicate garments: better answered by a person
Business customers (hotels, restaurants)	Draft quote and payment reminder	Prices and terms
Complaints	Draft of an empathetic reply with next steps	The solution (refund, redo) is decided by a person

5.3 Recruitment agency

This is the sector that needs the most legal care (see 6.3). AI can save a lot of admin work, but **decisions about candidates are always made by a person**.

Task	How AI helps	What the person checks
Writing job ads	A clear, inclusive draft based on the client company's notes	That there are no discriminatory requirements (age, sex, nationality…)
Scheduling interviews	Suggesting times, confirming and sending reminders	Changes and conflicts
Answering candidates' questions	Answers about the process, timelines and paperwork	Personal or sensitive questions
Summarising an interview	A structured summary based on your notes, organised around the job requirements	That the summary reflects what you observed
Reports for the client company	Draft report in the agency's format	Final content and recommendation (always yours)
Communicating the outcome	Draft of a respectful message	The decision and sending it

Don't use AI to: score or reject candidates automatically, infer personal data (age, health, religion, origin, sexual orientation, pregnancy, union membership…) from a CV, photo or voice, or analyse candidates' personal social media.

THIS WEEK

find your sector (or the closest one) and pick one row of the table to try.

SECTION 6

6. Data protection and responsible use

This section is for guidance only and does not replace advice from your adviser or a data protection professional. If in doubt, check the guides published by the Spanish Data Protection Agency (AEPD).

6.1 GDPR basics for everyday work

- **Only the data you need.** To ask for a draft reply, you usually don't need the customer's full name, phone number or ID number. Remove them or replace them ("Customer A").
- **Be careful with free or personal-use assistants.** Don't paste personal data about customers, employees or candidates into a tool your business has no contract with. If a tool is going to process personal data on behalf of your business, you need a data processing agreement (known as a DPA) and to know where the data is stored.
- **Check the settings.** Some tools use what you type to improve their models unless you switch it off. Find out, and switch it off if you can.
- **Specially protected data.** Health, religion, ethnic origin, sexual orientation, political opinions, union membership, biometric data: don't put them into AI tools unless you have a clear legal basis and appropriate safeguards. In practice, for a small business: don't do it.
- **Inform your customers.** Your privacy notice should explain which tools you use to serve them (for example, a reminder system) and what for.
- **Marketing messages only with permission.** Reminders about an appointment the customer booked are not the same as advertising. For promotions, you need the customer's permission and an easy way to unsubscribe.
- **People's rights.** If a customer asks to see or delete their data, you must be able to do so in the tools you use as well. Choose tools that allow it.

6.2 Responsible use

- **Transparency:** if a customer is talking to an automated assistant, tell them ("I'm [business]'s automated assistant; if you'd rather talk to a person, type PERSON").
- **Always a human option:** any customer should be able to talk to someone on the team.
- **Review:** anything going out that contains data, prices or commitments should be checked by a person until the task is proven.
- **Team training:** everyone who uses AI should know these basic rules. A short session and a printed copy of this section may be enough to start.
- **Passwords and access:** each person has their own login, two-step verification wherever available, and access is removed when someone leaves the business.

6.3 Recruitment: stricter rules

AI in recruitment is particularly regulated in the European Union. The EU AI Act classes systems used to select, screen or evaluate candidates as high-risk, and the GDPR protects people from decisions based solely on automated processing that significantly affect them. In practice:

- **A person always decides.** AI can organise information or prepare drafts; it doesn't reject or select anyone on its own.
- **No automatic rejections.** Don't set up filters that rule out candidates without a person reviewing each case.
- **Don't infer protected personal data** (age, health, disability, religion, origin, pregnancy, sexual orientation…) or use photos or voice for assessment.
- **Written, job-related criteria**, the same for every candidate.
- **Tell candidates** whether you use AI tools in the process and what for.
- **Keep data only as long as needed** and delete it when the period stated in your privacy notice ends.
- Before using an AI tool built specifically for recruitment, check with your adviser.

THIS WEEK

check which AI tools your team already uses (even on their own initiative) and whether anyone is pasting customer data into them.

SECTION 7

7. Costs: how to keep them low

We don't give market figures because they change quickly; what you can control is how you spend.

- **Start with what you already have.** Many programs you already pay for (booking, invoicing, email, office software) include AI features. Check before signing up for anything new.
- **Try it free, but without personal data.** Free versions are fine for learning and for tasks that don't involve customer data.
- **Pay for a specific use case.** Sign up for a tool once you have a chosen use case and a baseline (section 4), not "just in case".
- **Set a monthly cap** and an alert as you get close to it. Always ask what happens if you go over: whether the service is cut off or you're charged more.
- **Avoid overlaps.** One tool per task. Review your subscriptions every quarter and cancel the ones you don't use.
- **Calculate savings with your own numbers.** Hours saved per week × the cost of that hour, plus appointments or payments recovered. Compare it with what you pay.
- **Be wary of long contracts** when you're starting out: go monthly until you know it works.
- **Ask about the exit.** Can you export your data if you leave? Will they delete it?

Tools we recommend

- **Claude** (claude.ai): this is the tool we recommend.
- **HILOVIVO**: our own tool runs on Amazon Bedrock (AWS), is used via WhatsApp and has paid plans.

You'll find our Claude skill (new-ai-project-en) and the HILOVIVO tool, always up to date, at hilovivo.com/en/tools.

Whichever tool you choose, apply the same criteria from this section: a specific use case, a spending cap, a data processing agreement and the ability to export and delete your data.

SECTION 8

8. 30-, 60- and 90-day plan

Period	Goal	Tasks	Expected result
Days 1–30: organise and test	Understand your processes and get a first win	Map processes (step 1). Pick 1 use case (step 2). Measure the starting point (step 3). Write the FAQ document and the data rules. Appoint someone in charge. Start the small pilot.	One use case in pilot, with a baseline and basic rules known to the whole team
Days 31–60: measure and adjust	Confirm whether the first use case works	Weekly review of results and mistakes. Adjust instructions. Ask the team and customers for feedback. Decide to continue, adjust or drop it (step 5). Review the tool's contracts and privacy settings.	A decision made with your own data. If it works, the use case becomes "the normal way of working"
Days 61–90: expand wisely	Add a second use case without losing control	Pick the second use case from your list. Repeat steps 3–5. Document both use cases in an internal guide. Review spending and subscriptions. Schedule a quarterly review.	Two established use cases, spending under control and a person in charge with a weekly routine

SECTION 9

9. Checklist

Before you start

- [ ] I've written down the tasks that take up most of our time.
- [ ] I've chosen 1 (2 at most) use cases to start with.
- [ ] I've measured where that task stands today.
- [ ] There's one person in charge with time set aside every week.
- [ ] I have prices, hours, services and frequent answers in writing.

Before signing up for a tool

- [ ] It solves a specific use case I've already chosen.
- [ ] It has a data processing agreement (DPA) and I know where it stores the data.
- [ ] I can stop it from using my data to train its models (or it doesn't do so).
- [ ] It has clear pricing, a spending cap or alerts, and a monthly contract.
- [ ] I can export and delete my data if I leave.

Day to day

- [ ] Anything going out to customers is checked by a person (until it's proven).
- [ ] Customers know when they're talking to an automated assistant and can ask to speak to a person.
- [ ] We don't paste sensitive data into general-purpose assistants.
- [ ] We only send promotions to people who have given their permission.
- [ ] In recruitment, a person always decides and there are no automatic rejections.

Every month

- [ ] Review the indicators against the baseline.
- [ ] Review spending and subscriptions.
- [ ] Update prices, hours and instructions.
- [ ] Review who has access to each tool.

SECTION 10

10. Glossary

- **AI (artificial intelligence):** software that performs tasks that used to require a person, such as writing, summarising or understanding messages.
- **Assistant or chatbot:** a tool you talk to in writing or by voice and that replies with text.
- **Language model:** the "engine" behind an assistant; it has learned from huge amounts of text.
- **Instruction (or "prompt"):** what you ask the assistant to do. The clearer it is and the more context it has, the better the result.
- **Hallucination:** when AI makes up a fact and presents it as true.
- **Automation:** a task that runs by itself when something happens (for example, sending a reminder the day before an appointment).
- **Template:** a base document with blanks that are filled in for each case.
- **Human in the loop:** a way of working in which a person reviews or approves what the AI does before it takes effect.
- **Personal data:** any information about an identifiable person (name, phone number, email, appointment history…).
- **Special categories of data:** data given extra protection by the GDPR, such as health, religion, ethnic origin or sexual orientation.
- **GDPR:** the European Union's General Data Protection Regulation.
- **AEPD:** the Spanish Data Protection Agency, the supervisory authority in Spain.
- **Data processor:** a company that processes personal data on behalf of your business (for example, your online booking provider).
- **DPA (data processing agreement):** a contract that sets out how that provider handles your business's data.
- **EU AI Act:** the EU law that regulates AI systems according to their level of risk.
- **Indicator:** a simple number that tells you whether something is improving (for example, no-show appointments per week).
- **SaaS:** software you use over the internet for a subscription fee, without installing anything.

RESOURCES

Further reading

- Salim Ismail, Michael S. Malone and Yuri van Geest, *Exponential Organizations* (2014; Spanish edition, *Organizaciones Exponenciales*, 2016). The original book on the method.
- Salim Ismail, Peter H. Diamandis and Michael S. Malone, *Exponential Organizations 2.0* (2023). The updated edition, which now takes AI into account.
- Francisco Palao, Michelle Lapierre and Salim Ismail, *Exponential Transformation* (2018). The step-by-step handbook for the ExO Sprint: building the new alongside what already works.
- Spanish Data Protection Agency (AEPD): guides on data protection and AI (aepd.es).

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