



NEWITY's SMB AI Toolkit

*Trainings, prompts, and tools designed
for small business owners*

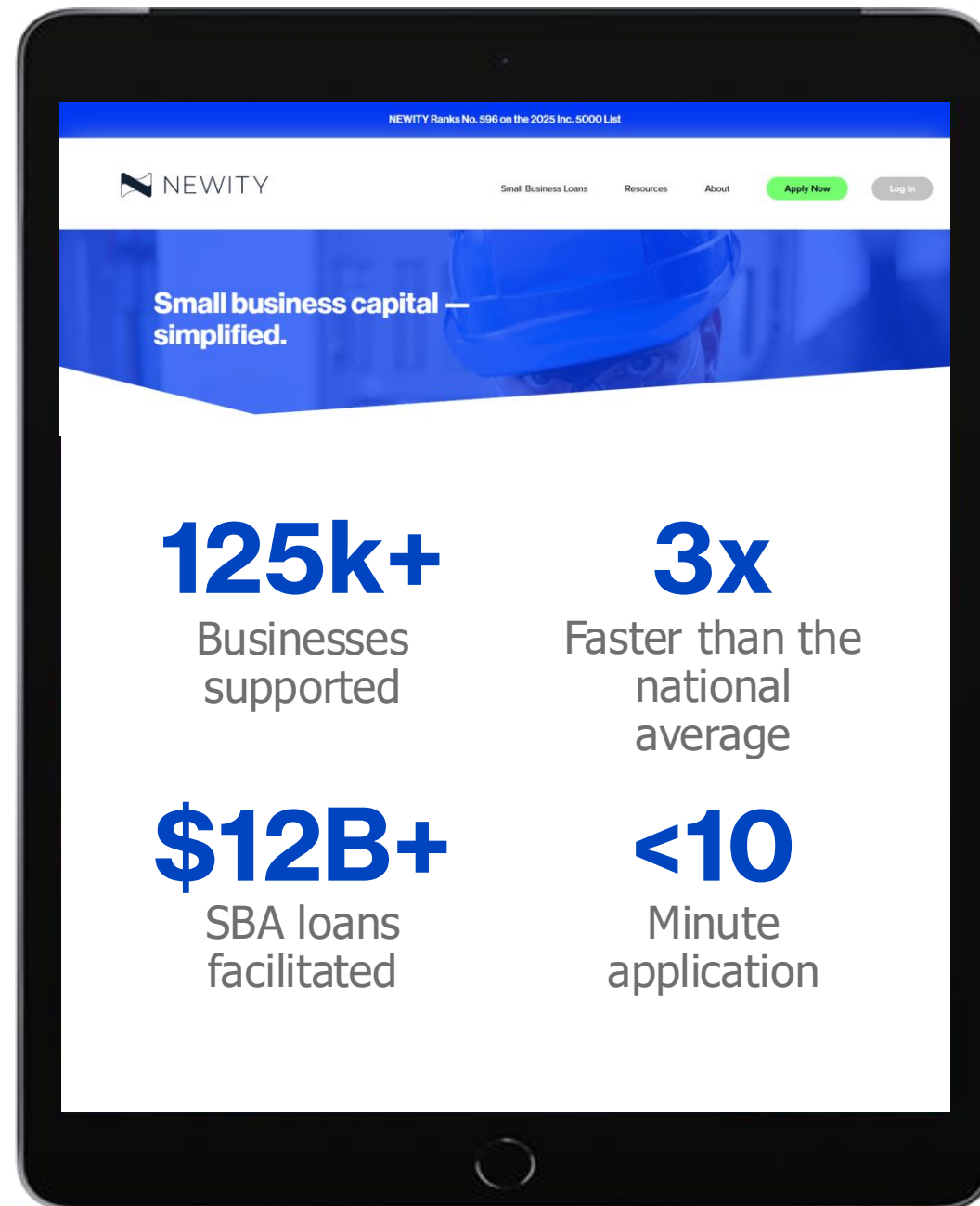
Presenter: James Moughon, SVP, Head of Product

Your source for small business capital.

We believe small businesses deserve equitable access to affordable capital.

We've helped more than 125,000+ business access more than \$12 billion in capital through small business loans.

We've streamlined the process so you can receive funding 3x faster than the national average.



Topics Covered

Why AI?

- **SMB AI Usage**
- *Can AI increase your revenue?*

AI Trainings

- **Training overview**
- *Recommended trainings to get you started*

AI Prompts

- **How to use prompts**
- *Recommended prompts to get you started*

AI Tools

- **What are some tools available to you?**
- *Which tools work best for which function?*

Live Demo

- **Explore the toolkit**
- *Q & A*

Why AI? Why Now?

The Benefits of AI to Small Business Entrepreneurs

89%

Of small businesses
now use AI

91%

Of small business
AI adopters report
measurable
revenue increases

\$3.50

Return on every
dollar invested in AI
integration

\$7,500

Saved on average
annually per
business

AI Trainings

Where to start

- The majority of AI project failures come from poor human input
- Understanding the basics of generative AI will drastically increase AI's capacity to fuel your small business
- Our AI trainings were created with small business owners in mind
- Mini trainings cover how to get started, using prompts, and understanding safety limitations

Trainings to Get Started

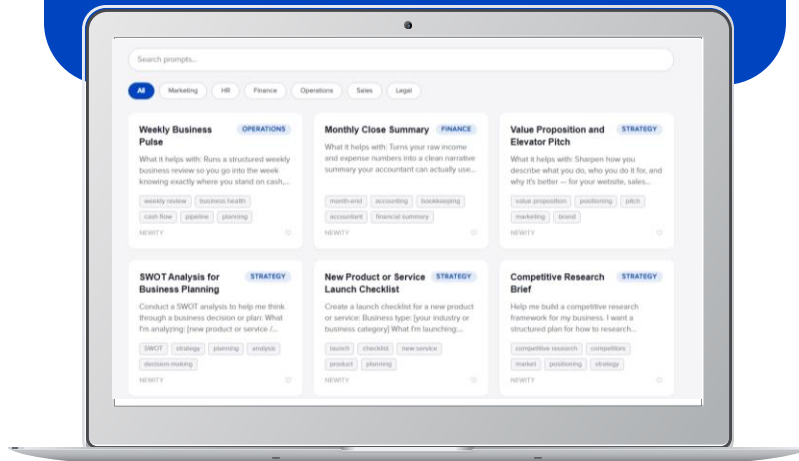
- Using AI prompts effectively
- AI Tools for Small Business - What to Use and When
- How to Use Claude
- Hallucinations - When AI Confidently Makes Things Up
- Controlling Tone and Brand Voice

NEWITY's AI Toolkit

What's included?

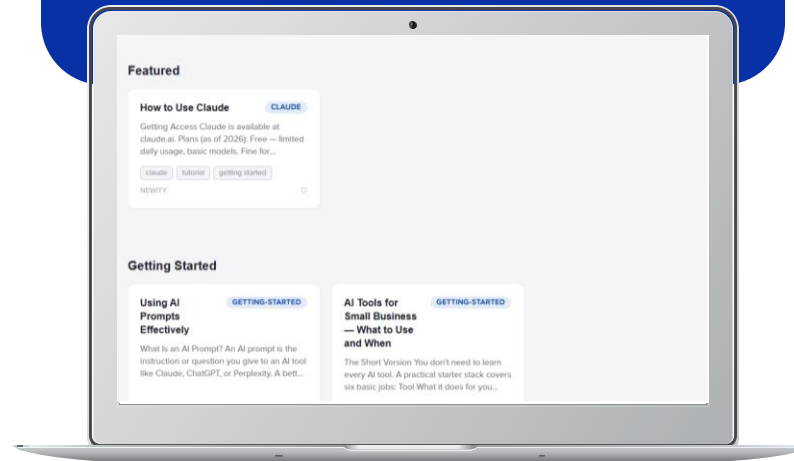
Prompts

50+ copy-paste AI prompts for every business task – finance, HR, marketing, operations, and more.



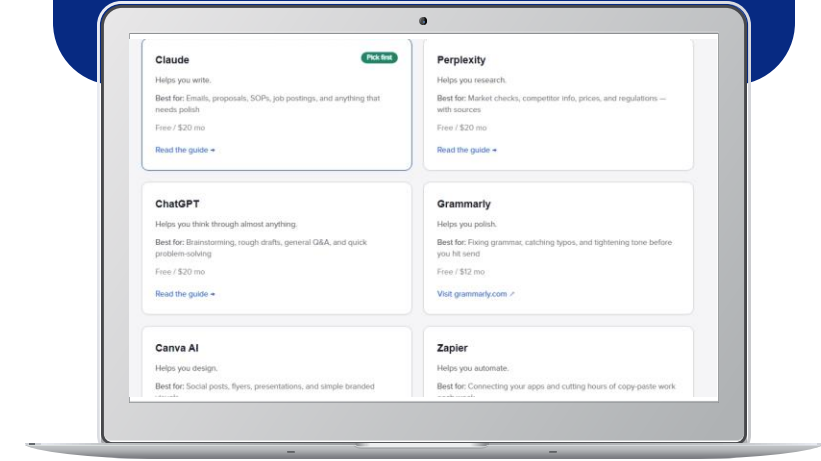
Trainings

Brief, beginner-level lessons for entrepreneurs new to AI.



Tools

Curated list of recommended AI tools with capability and recommendation overviews.



What Are AI Prompts?

Why our prompts set you up for success

What are prompts?

- Instruction or question you give to an AI tool
- Think of it as talking to a capable assistant
- Clearer, more specific prompts = better results

Providing proper context

- Best output requires a well-crafted prompt
- Toolkit prompts include context & output instructions
- Built-in do's & don'ts avoid common AI pitfalls

Created by AI experts

- Curated by NEWITY's team of AI experts
- Designed specifically for small business owners
- Copy-and-paste ready – no extra input needed

Prompts To Try

4 prompts to get started



**7 Day Social
Media
Calendar**



**Business Goal
to Quarterly
Action Plan**



**Generate
Promotion
Ideas**



**Weekly
Business
Pulse**

Tools

Which tool should you use?

Need to write?



Try Claude.

Need to research?



Try Perplexity.

Need to brainstorm?



Try Chat GPT.

Need to automate?



Try Zapier.

AI Do's and Don'ts

Things to watch out for using AI

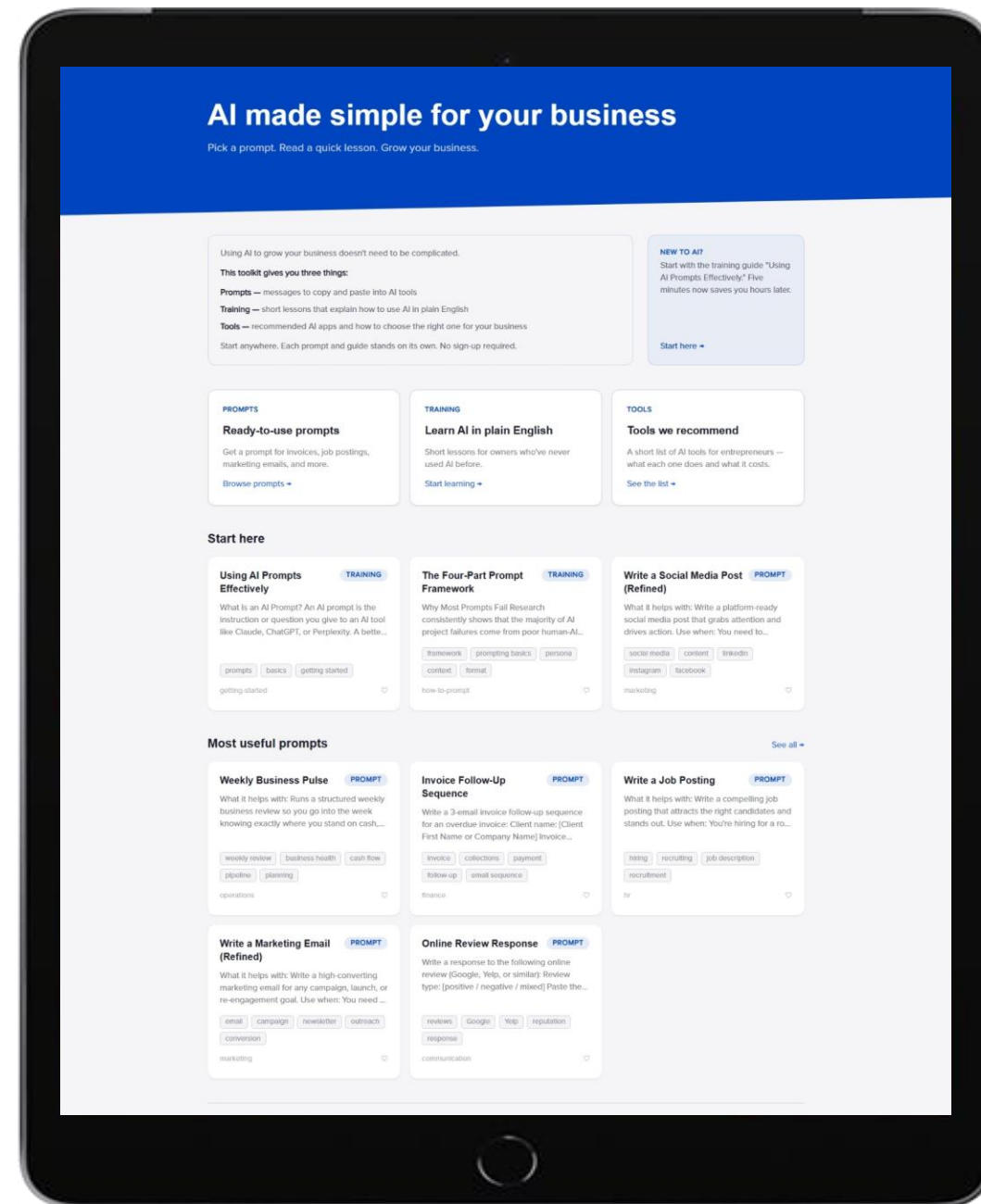
Best Practices

- ✓ Treat AI chat windows like public-facing notes – don't share confidential information
- ✓ Use approximate numbers instead of exact financials
- ✓ Always fact-check dates, citations, and figures
- ✓ Iterate – if the initial output is not ideal, revisit your prompt offer more specifications to narrow down the AI's response

Watch Out For

- x Hallucinations – AI can confidently invent facts
- x Never paste SSNs, bank account numbers, or tax IDs
- x Don't treat AI output as legal or professional financial advice
- x Always review every output before using

Navigating NEWITY's SMB AI Toolkit Live Demo



Q & A

Drop your questions in the chat!



Thank you!

A recording of this webinar will be emailed to participants.