

PRACTICAL AI GUIDANCE FOR THE EXPORT JOURNEY

AI Toolkit for Women-led Businesses



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Street address: ITC 54-56, rue de Montbrillant 1202
Geneva, Switzerland

Postal address: ITC Palais des Nations 1211 Geneva
10, Switzerland

Telephone: +41 22 730 0111

E-mail: itcreg@intracen.org

Internet: www.intracen.org/publications

AI Toolkit for Women-led Businesses

Practical AI guidance for
the export journey

About the paper

This toolkit helps women-led small businesses identify where artificial intelligence (AI) adds value to trade. It draws on a survey of 155 women entrepreneurs across Africa, Asia, Latin America, and the Middle East, plus a pilot in Viet Nam. Most already use AI, with concerns centred on data privacy, cost, and online fraud.

The toolkit uses a traffic-light system to show where AI adds value, where its output needs checking, and where decisions remain with the entrepreneur. It builds skills from structured prompting to supervised automation and includes a self-assessment, prompts, guides, a tool catalogue, and worksheets for piloting tools.

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For more information, contact: Edison Yap, zyap@intracen.org

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Foreword

Last year in Johannesburg at the first Global SME Ministerial Meeting, ministers from more than 60 countries endorsed by consensus a call to action on helping SMEs navigate new business frontiers. One of these frontiers is the digital revolution, whose pace and scale are already surpassing that of any comparable economic revolution in history. It is a trend that could turbocharge our collective efforts to deliver on the 2030 Agenda for Sustainable Development, leaving a far better world for future generations to inherit. But it is also rife with risks, including the very real possibility of contributing to social and environmental harm and deepening economic inequality.

What organizations like ours must do is help steer the world towards the former. And with frontier technologies, including generative artificial intelligence, evolving faster by the day, there is little time to lose. This toolkit is part of the International Trade Centre's contribution, answering a question that we are increasingly hearing from the SMEs we serve: how to make sure that AI can support women-led businesses on their export journeys, rather than holding them back.

We asked 155 women entrepreneurs in Africa, Asia, Latin America, and the Middle East how they use AI. More than three-quarters confirmed that AI has become part of their daily business practice. But the more they explore what AI has to offer, the more they ran up against concerns over how to use AI well, and how to prevent online fraud, protect data privacy, maintain the trust of consumers and buyers, and handle the costs of adopting these technologies.

This toolkit answers these questions. It marks each stage of the export journey with a traffic light, providing a candid assessment about where AI adds real value, where its output must be checked, and where it should not be used at all. It reinforces one of AI's biggest lessons so far: that while there are ways in which AI can help SMEs, there will never be a substitute for human judgment and critical thinking.

Our Strategic Plan for 2026–2030 commits ITC to helping small firms benefit from the digital transition and ensuring the gains reach women, young people, and others who have too often been underrepresented in global economic activity. The ITC SheTrades strategy for the same period puts that into practice, supporting women-led businesses through the digital and green transitions, value-chain upgrading, and South–South trade. While much is uncertain about what the future will hold, one thing is clear: we cannot afford a digital revolution that widens the distance between those who can use these tools well and those who cannot.

Generative AI reached one in six people worldwide by the end of 2025, spreading almost twice as fast in higher-income countries as in lower-income ones. The women in this study have kept pace on their own. What we seek to offer is practical guidance that is honest about the risks and the opportunities.

Pamela Coke-Hamilton
Executive Director
International Trade Centre

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The Spring 2026 capstone workshop team at Columbia University's School of International and Public Affairs (SIPA) developed the toolkit: Helena Carvalho Schmidt, Agustina Cianciarullo, Yasmine Ghenima, Flora Ren, Rechelle Rumawas, Kamayah Scruggs, Zohha Sheikh, and Zimo Yang. The team combined a desk review of AI adoption among women-led small businesses in Ghana, India, Mexico, and Viet Nam with survey and field research to produce one of the first practitioner-oriented AI toolkits written for women-led enterprises in developing and least developed countries.

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Edison Yap led the editorial review, supported by ITC consultants Natasha France and Francesca Martis. Jennifer Freedman edited the publication, and Magdalena Stadnik provided the graphic design.

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Acronyms

Unless otherwise specified, all references to dollars (\$) are to United States dollars, and all references to tons are to metric tons.

AI	artificial intelligence
API	application programming interface
CRM	customer relationship management
FAQ	frequently asked questions
FOB	free on board
GenAI	generative artificial intelligence
ITC	International Trade Centre
LLM	large language model
MOQ	minimum order quantity
SIPA	School of International and Public Affairs
SMEs	small and medium-sized enterprises

Executive summary

In 2026, ITC SheTrades surveyed 155 women entrepreneurs in Africa, Asia, Latin America, and the Middle East on how they use artificial intelligence. Those findings, together with a pilot with women entrepreneurs in Viet Nam, shaped this toolkit, developed with Columbia University's School of International and Public Affairs. Most survey respondents were already using these tools: 77% used AI in their business, and 89% relied on a smartphone in their work. Among them, 41% export and 32% were preparing to start.

This matters, because AI is spreading unevenly. By late 2025, generative AI had reached 16.3% of the world's population, advancing nearly twice as fast in higher-income regions as in lower-income ones. Yet the women surveyed have kept pace on their own, and their concerns lie elsewhere: data privacy, cost, and online fraud ranked highest, while fewer than 10% cited poor internet and language difficulties. Their challenge is not accessing these tools, but judging the quality of what they produce. This toolkit is designed to build that skill for women-led small businesses in developing and least developed countries.

AI is only as accurate as the business information provided to it.

An AI tool works from what it is given and presents every answer with the same assurance. A business whose price list is current will receive accurate drafts. A business working from a three-month-old price list will see that outdated figure repeated in every AI-generated reply until someone spots the error. Distinguishing fresh information from stale output is a learned skill – and this is what the toolkit aims to do.

The toolkit signposts where AI helps at each stage of the export journey.

It follows the five phases of exporting, from market research to market expansion, and the four functions that operate year-round: production and quality control, logistics and documentation, financial management and payments, and crisis management.

Each task includes a traffic-light signal to guide how to use AI. Green marks work where AI adds clear value at low risk, such as market research or drafting a first buyer reply. Yellow marks work that must be verified against an official source, including compliance requirements and export pricing. Red marks work where AI must have no part in the decision-making: negotiating terms, signing contracts, judging whether a batch meets standard, and selecting a new market.

[Annex III](#) presents the full map, and the same distinction shapes the safety guidance – from what should never be entered into AI tools to how cloned voices are used to redirect payments. This signposting lets a business start the toolkit at the point that matches its own operations, rather than reading from the beginning.

The skills unfold over three levels matched to how a business already uses digital tools.

Identifying where AI helps is half of the task; building the skill to use it is the other. Time is limited, with 77% of respondents able to give two hours a week or less to learning a new tool. A 15-question self-assessment places a business at one of three cumulative levels. Level 1 covers structured prompting and giving the tool the context it needs. Level 2 covers building a prompt library and a custom assistant that holds the business's products, prices, and tone. Level 3, which is optional, covers scheduled and automated work that the entrepreneur reviews before it is used. Each level ends with a one-page summary card.

Eight annexes supply the material needed for daily use.

They include 20 tested prompts across nine business functions, set-up instructions for four custom AI assistants, a catalogue of tools compared by cost, language coverage and mobile availability, a glossary, and worksheets for the self-assessment and for piloting a tool.

The toolkit concludes with that pilot: one tool, one task, one defined period, and a framework for deciding whether to continue. Tools will change. What endures is the ability to test one, judge the result, and decide – the skill this toolkit is built to leave behind.

Introduction



Introduction

Welcome to the International Trade Centre's artificial intelligence toolkit.

This toolkit is designed to help women entrepreneurs, like you, use artificial intelligence (AI) in practical ways to expand their export business. Whether you are new to exporting or are already shipping your goods internationally, this guide will help you identify where AI saves time, improves quality, or supports revenue growth – and where it does not.

This toolkit is grounded in fieldwork, surveys, and discussions with women entrepreneurs across different countries. Many of the women consulted already use AI tools such as ChatGPT to support tasks in marketing, client communication, and market research. This toolkit builds on that foundation, and helps you move towards more structured, optimized, and strategic use of AI in your business.

The goal of this toolkit is to support better decision-making when using AI. While these tools can be powerful, their value depends on how they are applied. Rather than offering one-size-fits-all solutions, this guide helps you assess where AI is useful in your business – and where it may not add value.

We hope this toolkit becomes a practical companion as you explore how AI can support your business on your terms, at your pace, and in ways that strengthen what you already do best.

ITC SheTrades Initiative

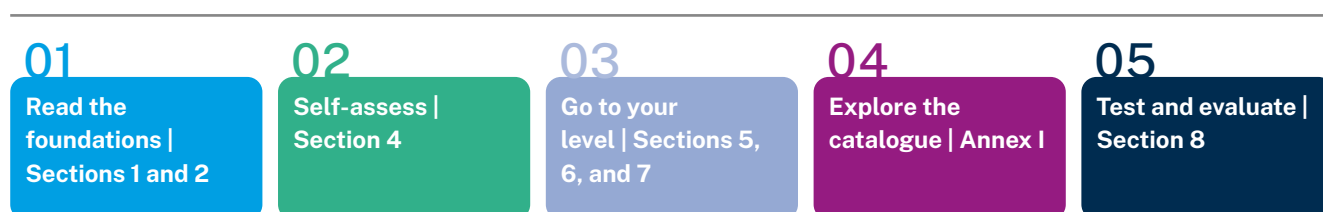
How to use this toolkit

You don't need to read this toolkit from start to finish. Some sections are essential, however, and the rest will be more useful if you read them in the right order. This section shows you where to start.

This toolkit has two main components: this **guide** and the **AI Tools Catalogue (Annex I)**. The guide aims to build the skills and judgement you need to use AI effectively in your business. The AI Tools Catalogue is a curated reference

of tools organized by level and business function, with information on cost, language support, and what each tool does best. The two work together: the guide teaches you how to think about and apply AI. The catalogue helps you find the right tools to put those skills into practice.

Figure 1: Elements of the learning path



Source: SIPA and ITC SheTrades

Your learning path

STEP 1: Read through the introductory materials (Sections 1 and 2)

Start here. [Section 1](#) (AI Landscape) explains what AI is. [Section 2](#) (Exporting Journey Map and Where AI Can Help) shows you where AI adds genuine value across your export journey, where it requires your oversight, and where it should not be used at all. Reading these two sections first will help you make better decisions for every following step.

STEP 2: Complete the AI self-assessment (Section 4)

The AI self-assessment places you on one of three levels based on how your business uses digital tools. The right starting point matters more than the most advanced option available.

STEP 3: Go to your level and build from there (Sections 5, 6, or 7)

The levels in this toolkit are cumulative.

- **Level 1:** The foundational skills that make every AI interaction more effective (structured prompting and saved assets).
- **Level 2:** Turning those skills into consistent, repeatable systems (personal prompt libraries and trained custom AI assistants).
- **Level 3:** Using those systems as the base for automations and scheduled tasks that run with your approval.

Each level depends on the one before. Skipping levels does not get you there faster; it makes the higher levels more difficult because the foundations are missing.

A note on specific tool examples: We use specific tools throughout this toolkit, mostly Claude and ChatGPT, as worked examples so the instructions are concrete. This is for clarity, not endorsement. The skills here apply across tools, and the AI Tools Catalogue ([Annex I](#)) compares options by level and business function so you can choose what fits your context.

STEP 4: Explore the AI Tools Catalogue ([Annex I](#))

Once you are comfortable with the skills in your level, go to the AI Tools Catalogue. It is organized by level and business function. Each entry explains what the tool does best, what it costs, which languages it supports,

and whether it works on mobile, so you can choose tools that fit your context.

STEP 5: Test one use case and evaluate ([Section 8](#))

Once you have reviewed the AI Tools Catalogue, return to the Implementation Guidelines in Section 8. Start with the Dos and Don'ts of AI. Then pick one tool, one task, and a short time period to test it. The evaluation framework will help you assess whether the tool created value, saved time, improved quality, or supported a real business outcome, so you can decide what is worth continuing.

Key principles to remember

- AI is most useful for supporting roles, not replacing judgement, trust, or human relationships.
- AI multiplies whatever you already do. If your prices and product details are organized and up to date, every draft it writes will be accurate. If your price list is three months old, it will quote the old prices in every reply until you notice.

SECTION 1

AI landscape



AI landscape

AI refers to computer systems that can perform tasks typically requiring human reasoning, such as reading, writing, analysing, and predicting. Adoption of generative AI reached [16.3%](#) of the global population by the end of 2025, with about one in six people using AI to learn, work, or solve problems—even if they do not always think of it as artificial intelligence.

But adoption is uneven. The gap between the Global South and the Global North widened from [9.8 to 10.6 percentage points](#) in the second half of 2025, as adoption in the North grew twice as fast as in the South. This toolkit was developed to help address that gap. Women entrepreneurs like you can become early adopters of AI and gain a real opportunity to build a competitive edge in your markets.

You are probably already using AI tools such as ChatGPT, Gemini, or Claude. This section explains the different types of AI you may encounter, so you can make more informed decisions about how to use them in your business. While ‘AI’ is a broadly applied term, most AI tools can be grouped into three categories:

- **Predictive AI (machine learning):** These systems analyse data to identify patterns and make predictions.

They have been used for years in applications such as spam filters for e-mails, content recommendation (e.g. Netflix and YouTube), facial recognition, and sales forecasting.

- **Generative AI (GenAI):** These tools create new content such as text, video, images, or even music, based on patterns learned from enormous amounts of data. Examples are chatbots fuelled by large language models (LLMs) such as ChatGPT, Deep Seek, and Claude.
- **Agentic AI:** These tools combine the machine learning ‘brain’ and the GenAI capacity for rational thinking and near-human-like interactions to take actions on your behalf. They can support tasks such as managing workflows, responding to e-mails, and assisting with business functions. These tools are newer and require careful testing before being fully integrated into business processes.

In practice, many tools cross these categories. Some are specialized – such as Suno AI for music, ElevenLabs for voice, and Runway for video. Others are general-purpose: ChatGPT, Claude, and Gemini each handle text, images, and basic reasoning with different strengths. The AI Tools Catalogue ([Annex I](#)) compares them in greater detail.

Useful tip:

How AI works, and how to get better answers from it

It helps to picture an AI tool as a fast, confident assistant who has read an enormous amount but has never seen your business. That explains both what it is good at and what you need to do.

It predicts, it does not know. It learns patterns from huge amounts of text and predicts what usually comes next, with no sense of truth. So read every answer as a draft, not a fact.

It is strongest in a few languages. Most training data is in English and a handful of widely used languages. So for other languages or small local markets, give it more context and ask someone who knows the language or market to read the result.

It only knows up to a point in time. The tool was trained on an enormous amount of text, and that training stopped on a fixed date. It does not know what happened after that, such as something you heard in the news today.

Many tools can now search the internet while they answer, so some replies do carry current information. But the reply looks the same either way, and you cannot tell which one you are getting. So when the answer depends on something that changes, such as a price, a rule or a deadline, ask it to search and list its sources, then open them yourself. And where you already have the current figure, give it to the AI rather than leaving it to guess.

It repeats the patterns in its data, including bias. So before you reuse one set-up many times over, check the result works for every buyer group you serve.

It forgets. Even after you set a rule, it can drift back later in the same conversation. So repeat your key rules and re-read long chats.

It can invent sources. So open every link or citation it gives you and confirm it exists and says what the tool claims.

SECTION 2

The Export Journey Map and where AI can (and can't) help

Running an export business means managing several things at once: finding buyers, communicating across languages, staying on top of documentation, tracking payments, and keeping product quality consistent, often as a small team. AI can support many of these functions. But it does not help equally across all of them, and relying on it in some areas without careful oversight can create serious problems.

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The Export Journey Map and where AI can (and can't) help

Where can AI help your business?

This section introduces a simple traffic-light system to help you decide how much to rely on AI for different tasks. You can apply it throughout your export journey as well as in the day-to-day operations of your business.

Go: AI adds clear value. Tasks where AI reliably saves time, improves consistency, or accelerates output with low risk. **The output still needs your review** before it reaches a buyer or is published.

Proceed carefully: AI can help, but double-check.

Tasks where AI can contribute meaningfully, but where errors, outdated information, or missing context could cause real problems. Use AI as a starting point, then check against your own knowledge/resources and official sources.

Stop: Human judgement leads.

Decisions and actions where AI should not be the author or the final authority. AI can inform your thinking and help you prepare, but the decision and the accountability are yours.

Figure 2: Export Journey Map



Source: SIPA and ITC SheTrades

Figure 3: Where AI can and can't help (all phases)

01 EXPORT READINESS & MARKET RESEARCH	
<p>At this stage, you are likely researching potential markets, comparing buyer requirements across countries, assessing whether your pricing can cover export costs, and determining which compliance and certification requirements apply to your product.</p> <p>The challenge is that information is scattered, market data feels abstract, and it is easy to spend weeks researching without arriving at a clear decision.</p> <p>AI can help you move faster, but the decision itself is yours to make.</p>	<p>Market comparison & research briefs</p> <p>AI synthesizes trade data quickly. Review against current sources before acting.</p>
	<p>Identify compliance & certification requirements</p> <p>AI surfaces the right questions for you to research, but regulations may change. Always verify with official sources or a trade adviser.</p>
	<p>Structure export pricing & cost categories</p> <p>AI builds the framework and flags gaps. Real numbers must come from your own data.</p>
	<p>Decide whether & where to export</p> <p>A strategic decision involving capital and risk. AI only supports the analysis; you make the decision.</p>
02 MARKETING & BUYER OUTREACH	
<p>This is where many women entrepreneurs like you first start using AI, and where it delivers the most added value.</p> <p>The challenge at this stage is volume and consistency: product descriptions to write, buyers to follow up with after trade fairs, communications to manage in multiple languages, and a brand voice to maintain across it all.</p> <p>AI can handle the heavy lifting of drafting and creating different communication materials, so you can focus on the relationships.</p>	<p>Product descriptions & catalogue content</p> <p>High-value use case. Use a brand voice asset for consistent, on-brand output at scale.</p>
	<p>Draft social media & marketing assets</p> <p>Works well with a detailed brand briefing (include captions or images). However, unedited output reads as generic. Always personalize before publishing.</p>
	<p>Draft buyer outreach & trade fair follow-ups</p> <p>AI drafts structure and tone. You add details and review before sending.</p>
	<p>Translate communications & materials</p> <p>Strong for over-represented languages; performance varies in lower-resource language. Have a fluent speaker review before sending.</p>
03 MARKET ENTRY & BUYER NEGOTIATION	
<p>This is the highest-stakes point in the export journey. Contract clauses are difficult to interpret, payment terms create cash-flow pressure, and the temptation to agree quickly to secure a buyer is real.</p> <p>AI can help you prepare and understand your options, but the decisions and commitments at this stage require your judgement, and where the stakes are significant, professional advice.</p>	<p>Research contract terms, Incoterms & payment structures</p> <p>Useful overview, but terms vary by jurisdiction. Verify with a freight agent/trade adviser.</p>
	<p>Explain contract clauses in plain language</p> <p>Helpful for a first read and review. Do not treat it as legal advice. If possible, involve a qualified legal adviser for real commitments.</p>
	<p>Negotiate pricing & commercial terms</p> <p>AI can help you prepare and anticipate objections. The negotiation itself is a relationship and judgement call.</p>
	<p>Sign contracts or make legally binding commitments</p> <p>Never delegate to AI. Review everything yourself and involve a legal or trade adviser when the stakes are significant.</p>

04 CUSTOMER ENGAGEMENT & AFTER SALES

Buyer relationships are built on responsiveness, consistency, and trust. The challenge at this stage is volume: too many messages across too many time zones, follow-ups that slip through the cracks, and complaints that feel high stakes to handle.

AI can take significant pressure off the communication workload here, as long as you review everything that goes out under your company's name.

Draft responses to buyer inquiries & follow-ups

High-value daily use. A custom assistant produces a strong draft quickly.

Manage buyer communication across languages

Strong for over-represented languages in training data for Western models (English, Spanish, French, Chinese). Always review output before sending.

Handle complaints & disputes

AI can draft a measured response. Read carefully. You understand the relationship context better than the tool.

Decide how to respond to a serious dispute

Disputes may involve money or damaged relationships. AI should not determine your position on how to resolve conflicts.

05 MARKET EXPANSION

Expanding into new markets introduces a new layer of complexity: regulatory differences between countries, higher capital requirements, and the challenge of managing multiple markets simultaneously without stretching capacity too thin.

AI can help you structure the analysis and explore your options, helping you build a strategy, but the judgement calls at this stage are yours alone.

Brainstorm product adaptations for new markets

Good for structured comparison. Your product knowledge determines what works.

Research new markets & regulatory differences

AI gives a structured first overview. Reflects training data, not real-time conditions. Always verify with local advisers.

Draft expansion scenarios & business cases

AI structures the options clearly. However, your financial projections must be grounded in your real data, not AI estimates.

Decide which new market to expand into

Choosing a new market is a strategic decision. You can use AI to prepare the analysis. But you are the decision maker.

Source: SIPA and ITC SheTrades

The exporting journey

Phase 1: Export readiness and market research. At this stage, you are probably researching potential markets, comparing buyer requirements across countries, assessing whether your pricing can cover export costs, and deciding which compliance and certification requirements apply to your product. The challenge is that information is scattered, market data feel abstract, and research can drag on for weeks without leading to a clear decision. AI can help you move faster, but the decision itself is yours to make.

Phase 2: Marketing and buyer outreach. This is where many women entrepreneurs like you first start using AI, and where it delivers the most added value. The

challenge at this stage is volume and consistency: drafting product descriptions, following up with buyers after trade fairs, handling multilingual communication, and a keeping your brand voice coherent throughout. AI can handle the heavy lifting of drafting and creating different communication materials, so you can focus on the relationships. Again, you must always review the AI output.

Phase 3: Market entry and buyer negotiation. This is the point in the export journey with the highest stakes. Contract clauses can be difficult to interpret, payment terms can strain cash flow, and the urge to agree quickly just to secure a buyer is strong. AI can help you prepare

and understand your options, but the decisions and commitments at this stage require your judgement and, where the stakes are significant, professional advice.

Phase 4: Customer engagement and after sales. Buyer relationships are built on responsiveness, consistency, and trust. The challenge at this stage is managing the volume of communication: messages arriving from multiple time zones, follow-ups that easily slip through the cracks, and complaints that require careful handling. AI can take considerable pressure off the communication workload, provided you review everything that goes out under your company's name.

Phase 5: Market expansion. Expanding into new markets introduces a new layer of complexity: regulatory differences between countries, higher capital requirements, and the challenge of managing multiple markets simultaneously without stretching capacity too thin. AI can help you structure the analysis and explore your options, helping you build a strategy, but the judgement calls at this stage are yours alone.

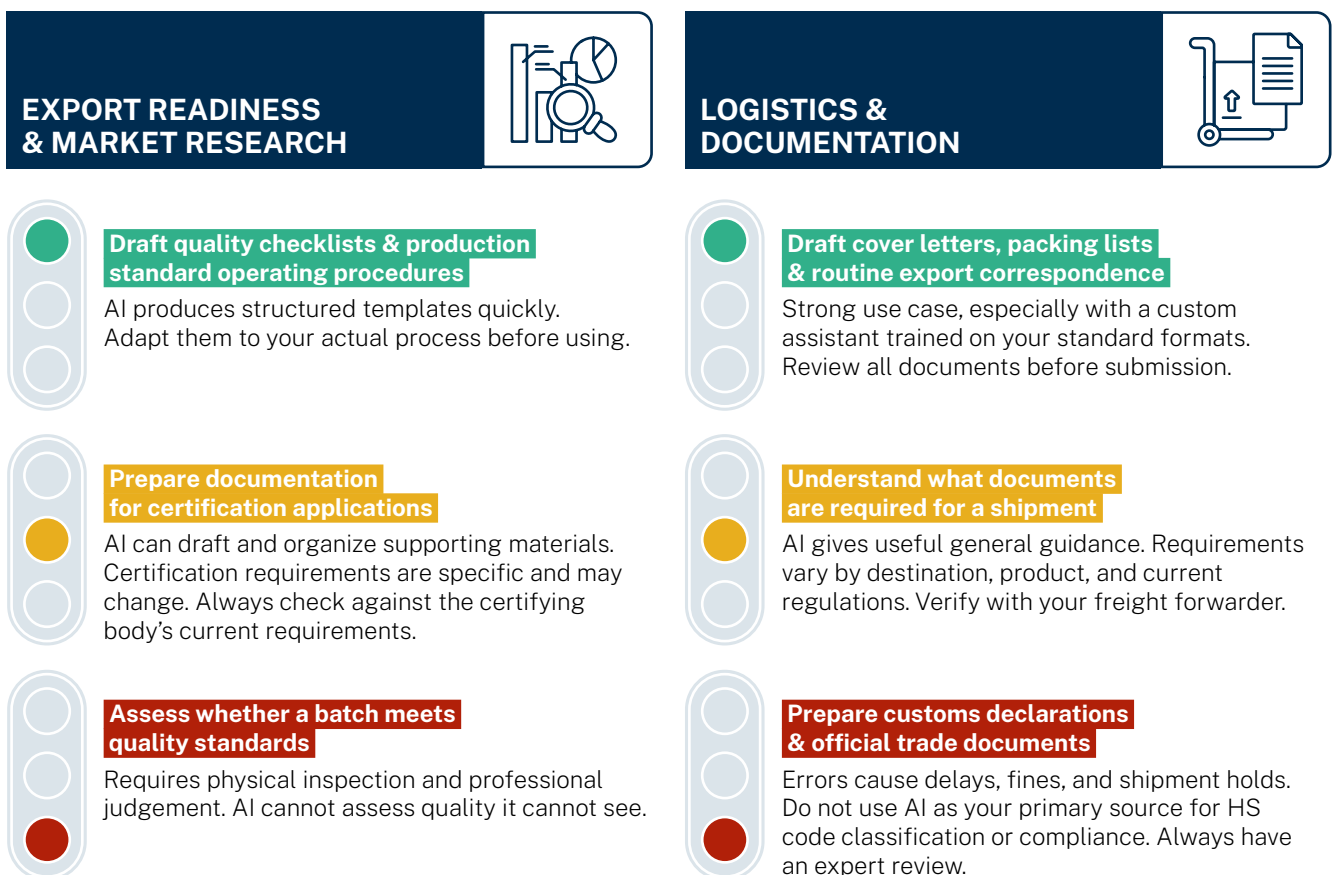
Continuous operations

Another way to apply this traffic-light system is across different functions that run continuously in your business operations, such as production and quality control, logistics and documentation, financial management and payments, and crisis management.

The same logic applies to the work that runs all year. AI can draft a quality checklist, but it cannot judge whether a batch meets the standard. It can draft a packing list, but it cannot tell you which documents this particular shipment needs.

[Annex III](#) presents more examples of how AI can be used in business operations. [Section 8](#) offers a more comprehensive list of dos and don'ts to keep in mind as you experiment with AI tools.

Figure 4: Where AI can and can't help (by business function)



FINANCIAL MANAGEMENT & PAYMENTS



Organize financial data & flag overdue invoices

AI surfaces what needs attention across your spreadsheets. It is still your responsibility to act on it.

Analyse profit per shipment & identify cost patterns

AI can surface patterns across your data, but only if the input is accurate and up to date.

Make pricing decisions, manage currency risk, or apply for financing

Financial decisions with real consequences require your judgement and, where needed, your accountant or financial adviser.

CRISIS MANAGEMENT



Draft urgent communications to buyers, suppliers, or partners

AI can help you find the right tone under pressure. Review carefully, what you send during a crisis shapes the relationship going forward.

Make decisions under crisis conditions

Urgent decisions with real financial and relationship consequences belong to you. AI is a thinking partner in these moments, not a decision maker.

Source: SIPA and ITC SheTrades

SECTION 3

Your digital foundations checklist

Before using AI, make sure your basic digital set-up is in place. AI does not fix disorganized systems or wrong information – it amplifies them. In many cases, simple digital practices can resolve key business challenges without requiring complex tools. For example, setting up automated responses in WhatsApp Business or organizing client information may significantly reduce your workload before AI enters the picture. Think of this as the housecleaning that prepares your business to welcome new digital tools.



Your digital foundations checklist

Your checklist before adopting more AI tools:

- **A dedicated business e-mail, separate from personal accounts.** Most e-mail clients (including Gmail for Business) let you set up canned responses or templates for common replies.
- **A separate account for each AI tool you use.** Keep it your business account distinct from your personal one.
- **A WhatsApp Business account.** Configure it with your business hours, a welcome message for new contacts, and quick replies for three to five questions your customers ask most often.
- **A simple online presence.** Create a business website or one active social media account where buyers can find you.

These foundations are not mandatory, but they make it easier to test and experiment with AI tools. You don't need to complete every item on this checklist before using the toolkit, but the more prepared you are, the more value you will get out of Levels 2 and 3. Start with this checklist if most of these items are not yet set up. It will save you time as you move through the rest of the toolkit.

For Levels 2 and 3, AI works best when your business information is already organized and easy to access.

Before building custom assistants or automations, make sure the following foundations are in place:

- **Organized business information:** Sales, customer, product, financial, and order data stored in one place, such as a spreadsheet, a bookkeeping tool, or a customer relationship management (CRM) system.
- **Clear digital folders:** Key files such as invoices, orders, product lists, price lists, client contacts, certifications, and templates saved electronically and organized by client, product, date, market, or document type.
- **A short business information document:** Your business name, what you sell, who your buyers are, prices or price ranges, contact details, product details, and preferred tone. This can become your first reusable AI asset.
- **An updated online presence:** Consistent business name, contact and product information, and links across social media, websites, marketplaces, directories, or buyer platforms.
- **Basic digital safety:** Strong passwords, two-factor authentication where possible, and device protection for accounts that store client, financial, or business information.

[Annex VI](#) lists additional automation tools that can support these foundations once you are ready.

SECTION 4

AI self-assessment

This self-assessment is designed to help you identify your business starting point when using AI, based on how you already work with digital tools (not your business size, sector, or stage of growth). Rather than measuring how 'advanced' your business is, it focuses on your current practices and where AI can be most useful.



AI self-assessment

After answering 15 short questions across the categories below, you will know your level of AI readiness and whether you are just getting started or ready to build more advanced skills. Use the results as a guide to navigate the toolkit, identify relevant tools, and take the practical step to experiment in your AI journey.

- **Category 1:** Foundations (devices, connectivity, basic knowledge)

- **Category 2:** Infrastructure and capacity (tools, processes, team set-up)
- **Category 3:** Learning culture (habits of testing, reviewing, iterating)

Take the self-assessment in [Annex V](#), then come back to interpret your score using the table below.

15 – 25	Level 1	26 – 40	Level 2	41 – 60	Level 3
Build a good prompt You are starting your AI journey or have been using it casually. Begin with Level 1 to build the foundational prompting skills that will make every AI interaction more effective.		Build repeatable workflows You use AI regularly and have some foundations in place. Level 2 will help you build a prompt library, a custom AI assistant, and consistent workflows.		Automate tasks You have strong AI habits, organized information, and custom systems running. Level 3 will help you shift from manual work to automated, scheduled workflows that keep your business running even when you're not at your desk.	

Now that you know your AI level, you can go straight to the corresponding sections!

Key principles that apply at every level

AI tools are powerful and they work best when you stay in the driver's seat. As you explore this toolkit, keep these principles in mind:

- **You are always the decision maker.** AI drafts, suggests, and summarizes. It does not replace your judgement, your relationships, or your expertise about your own business.
- **Review before you send.** AI can sound confident even when it's wrong. Read every output before it reaches a buyer, a partner, or a public channel.
- **Protect your data.** Avoid pasting sensitive information such as client details, financial records, and contracts into AI tools unless you have read the platform's privacy policy and understand how your data are used.
- **Start small and test.** The best way to learn what works for your business is to try one task, evaluate the result, and build from there. You do not need to commit to a tool before you have seen what it can do for you.
- **When in doubt, check again.** For anything involving regulations, certifications, legal terms, or financial figures, always cross-check against an official source. AI is a starting point, not a final answer.

SECTION 5

Level 1: Write a good prompt

This section targets entrepreneurs who are new to AI and want stronger, more reliable output.

Where can AI help your business?18



Level 1: Write a good prompt

Before you experiment, read the dos and don'ts in [Section 8, Part 1](#). 10 minutes there will save you the mistakes that are hardest to undo.

What will you learn in Level 1?

At this level, you will learn about structured prompting and the importance of priming an AI. Prompting is the foundational skill for getting good results from LLMs – the ‘predict what comes next’ technology described in the box above – such as ChatGPT, Claude, and Gemini.

It involves preparing the AI for a task by defining the scope and quality expectations upfront. This process is called priming. The following section covers two core skills: prompting and developing ‘assets’.

Persona: Sofia, 42 years old. Handicraft manufacturer in Mexico City



Her business: Sofia is active online, mostly through her phone, and runs her handicraft business. Her WhatsApp Business account has set work hours and out-of-office automatic responses and she and her team members have dedicated business e-mails for core functions and client communications. Her business is preparing to export later this year.

Current AI use: Sofia has an account with an AI chatbot that she is still testing and exploring. She uses it to think through ideas and ask questions in a conversational style. She follows AI developments closely and is considering what potential benefits it can bring to business practices.

Challenge: After experimenting independently, Sofia wants to move beyond informal use and understand how to use the AI chatbot more effectively.

Core need: Her goal is to use the AI tool's free trial period to refine her skills in using the chatbot. She wants to strengthen her prompts and feedback to boost creativity and speed up problem-solving in her business.

Core skills

Skill 1: Prompting

Regardless of the AI tool, every user must know how to prompt effectively – clear instructions define the task, the approach, any assumptions or constraints, and the desired output format. While prompts can vary in form and complexity, they all share a common foundation that can be simplified into a direct prompt structure:

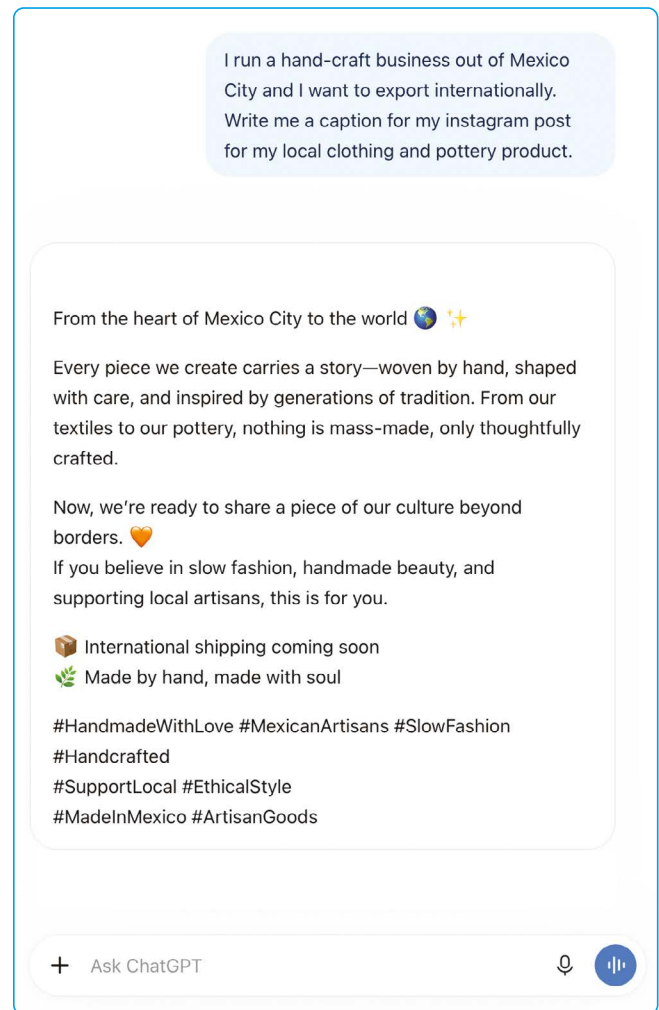
- **Context:** What larger goal is this AI task supporting? (company, product, goals, etc.)
- **Role:** What role is the AI playing in this task? (writing, editing, drafting, planning, organizing, translating, etc.)
 - The more precisely you name the role, the better the result. ‘A social media expert’ is vague. ‘A copywriter who writes for artisanal brands selling to European boutiques’ gives the tool something to work with.
 - If you are unsure, ask: ‘What kind of specialist would normally do this task?’
- **Task:** Given that role, what specifically does the AI need to do?
- **Format:** What should the final output look like, and in what format should it be delivered? (presentation, outline, paragraph, etc.)
- **Constraints:** What rules should the AI follow or avoid? (word count, tone, language, topics to exclude, etc.)
- **The finishing move: let it ask you:** You will not always know what the AI needs in order to do a job well, and you should not have to.
 - End your prompt with one line: ‘Before you answer, ask me any questions you need to do this well.’
 - A good tool will come back asking who the customer is, what the product costs, which platform this is for, or what you want the reader to do next. Answer those, and the second attempt lands far closer than the first.

Here are common starter prompts that, with a bit more structure, could produce far stronger results:

- **‘Write me an e-mail’** – lacks context, recipient, and purpose
- **‘Create an image of my bag’** – no description or clear reference (what does ‘my bag’ look like?), no specific style or tone, no context on the use of the image

Figure 5: Example of a weak prompt

A weak prompt produces generic results.



Source: SIPA and ITC SheTrades

- **‘Summarize this: [long block of text].’** – lacks instruction on what to do with the text, what is important to draw from it, and what the summary should deliver
- **‘Make this better’** – no definition of ‘better’ or what ‘this’ is

While AI is a powerful assistant, its output is only as strong as the instructions and context it is given. It cannot decide on scope, tone, or priorities for the user – the user must specify these, or AI will produce something generic and unoriginal. Here is what that structure looks like in practice, used to strengthen a simple prompt:

Simple prompt / request: Write me a caption for this Instagram post.

Revised prompt using structure:

Context: I run [BUSINESS NAME] in [COUNTRY]. We are launching a new product in our [COLLECTION] collection. My customers are [DESCRIBE THEM: for example, women aged 30 to 50 in Europe who buy handmade goods and care about who made them]. Our voice is [DESCRIBE: for example, warm and proud of the craft, never salesy]. The product is: [DESCRIPTION].

Role: You are a social media copywriter who writes for artisan brands selling into export markets.

Task: Write captions for this launch. Each one must end with a clear call to action

and/or a URL, such as 'Send us a message to order'.

Format: A separate caption for each platform, because each works differently: Instagram (warm, up to 125 words, 3 to 5 hashtags), Facebook (longer, more storytelling), TikTok (a spoken script under 30 seconds). Two options per platform, in English and [LANGUAGE].

Constraints: Match the tone of these captions I have written before: [PASTE TWO EXAMPLES]. No more than five hashtags. Do not use 'handmade with love' or similar. Do not copy another brand's wording. Before you answer, ask me any questions you need to do this well.

Figure 6: Example of a strong prompt

A more structured and detailed prompt produces results that are more unique to your business, audience or platform used.

2. Visual + lifestyle appeal (great for Instagram)

EN:

Color you wear. Culture you live. 🦜 ✨

Our newest Toucan pieces—a bold handcrafted vest and a set of traditional vases—bring the spirit of Mexico City into every moment, from what you wear to how you live.

Made by hand. Made to be seen.

ES:

Color que llevas. Cultura que vives. 🦜 ✨

Nuestras nuevas piezas Toucan—un chaleco artesanal y un set de jarrones tradicionales—llevan el espíritu de la Ciudad de México a cada momento, desde lo que usas hasta cómo vives.

Hecho a mano. Hecho para destacar.

Strengths: Strong hook, very "Instagrammable," ties fashion + home together.

Weaknesses: Slightly more marketing-heavy, less emphasis on craft detail.

📄 📤 🗣️ 🔄 ...

4. Launch energy + engagement (best for TikTok/Reels crossover)

EN:

New in Toucan. 🦜 🔥

A statement vest. A timeless set of vases. Same roots. Same craftsmanship. A bold new chapter.

Which one is your favorite? 🗣️

ES:

Nuevo en Toucan. 🦜 🔥

Un chaleco que destaca. Un set de jarrones atemporales.

Mismas raíces. Misma artesanía. Un nuevo capítulo audaz.

¿Cuál es tu favorito? 🗣️

Strengths: Engaging, encourages interaction, great for algorithm reach.

Weaknesses: Less descriptive; depends on visuals to carry meaning.

📄 📤 🗣️ 🔄 ...

The difference is not that the second prompt is longer. It is that it carries your business: who your customer is, what makes your product yours, what you want the reader to do next, and how each platform actually works. The first prompt produces a caption that could belong to anyone. The second produces one only you could have asked for.

The same prompting skill applies whether you are drafting an e-mail, translating a document, or analysing customer feedback. While prompting is a high-impact skill, it doesn't replace human oversight—it still depends on human instructions (knowledge, prioritization, and clear communication). AI outputs are built on patterns and averages, and may include errors, biases, or oversimplifications. Reviewing and refining outputs is essential to ensure quality, accuracy, and alignment with your business.

Skill 2: Priming with context ('assets')

Imagine that instead of typing your product description, brand voice, or project context into the chat every time, you could simply upload a file that already contains it. That is what assets do.

An asset is usually a short text document, but it can also be a price list, a spreadsheet, or a set of product photos. It captures the key context for the AI tool, so you don't have to retype it in every chat. Check which file types your AI tool accepts, and how large a file it will take. Developing assets that form a focused knowledge base for the AI helps speed up priming and improve output quality. Commonly used assets include the following:

- **Brand identity and company profile:** This document defines the user's business identity for the AI – its voice, mission, target audience, and core values. It can include a style guide, a detailed company overview, and product descriptions to give the AI a full picture of the business and its priorities. In Level 2, this asset becomes the foundation for a business briefing that powers your custom AI assistant with built-in context.
- **Project context:** This file contains important background information for the project or programme the task supports. These assets are usually temporary deliverables tied to specific goals or demands, such as new product collections or new marketing campaigns. For instance, if a user plans to manage a workstream focused on market research or client outreach, it's useful to supply a supporting document that clarifies the goals, describes completed work, and highlights the project's priorities.

Useful tip:

If you are not sure what specialist to ask for

The above list is not exhaustive as there are hundreds of roles possible depending on your use case. If your task is not covered above, ask the AI: 'What kind of specialist would normally do this task?'

Useful tip:

Make it sound like you

Unedited AI text can appear robotic, and buyers recognize the generic style: flowery praise ('exquisite craftsmanship'), three of everything ('durable, beautiful, and sustainable'), X-and-Y constructions ('not only ... but also'), and headings with every word capitalized.

Deleting those phrases is not the fix. What makes the writing yours is what only you know: the embroidery stitch you use on your bags, the village your cotton comes from, the buyer's last order. Put those in and the writing will read like yours.

Before you send anything, read it aloud. If it does not sound like you, edit until it does.

- **Buyer profile and feedback:** A short description of the people you sell to, and what they say about your products. Write down who they are, what matters to them, and how they like to be spoken to. Then collect real examples in their own words—reviews, WhatsApp messages, e-mails, complaints—and keep them in one file. Be careful not to include personal or sensitive data (see Box 1). With this, the AI can answer in the way you would, drawing on what your customers actually care about rather than what it assumes.

Together, these priming documents give the AI a strong backbone of context, offering deeper insight into the user's long-term vision, strategy, and goals, and helping the tool produce answers that stay closely aligned with that vision. These are very important because AI cannot prioritize: only a human can tell the AI what to prioritize correctly.

Examples: Common ways to use these skills

Below are examples of how prompting, context (or assets), and personalization can come together in different business tasks. You will follow Sofia's journey in applying these skills.

Example 1.

Customer service and communication – Sofia handles a buyer inquiry

Sofia receives a WhatsApp message from a potential buyer in Canada asking about her product range and lead times. She used to type a fresh reply every time, which took her 20–30 minutes and often felt inconsistent. Now she uses a saved prompt template from her library.

How this helps: It enables quick, consistent replies to customer messages, written in her natural voice, not in generic AI phrasing.

Context: I run a small handicraft business, Artesanías Sofia, based in Mexico City. Most of my clients are boutiques in North America and Europe. They appreciate prompt, warm, and professional responses. Here is a sample message I usually send: [PASTE MESSAGE].

Role: You are a customer service assistant helping me respond professionally and warmly.

Task: Draft a response to this buyer inquiry: [PASTE MESSAGE].

Format: Provide two versions: one formal and one friendly. Keep the tone respectful and human. Keep the message under 150 words.

Optional: If the buyer's request is unclear, include one polite follow-up question at the end.

Sofia's tip: She keeps her frequently asked questions (FAQ), which cover standard lead times, minimum order quantity (MOQ), and export destinations, saved as an asset she can attach or paste whenever she uses this prompt. Updating it once updates every future reply. Sofia also pasted two or three messages she had previously written and asked the tool to match her writing style; before sending the AI-generated message, Sofia would review quickly and edit at least one line so that the message sounds like it comes from her.

How to adapt this: Update the customer message and attach your FAQ 'asset' depending on the situation. This template works for WhatsApp, e-mail, and marketplace platforms.



Example 2.

Data analysis and decision-making –Sofia analyses customer feedback

Sofia recently launched a line of painted ceramic figurines alongside her traditional woven bags. She collected feedback from 15 buyers through a short survey to help her decide whether to keep the new line or focus on what she knows best. She pastes the responses into her AI tool with a structured prompt.

How this helps: It streamlines the process by turning raw responses into a clear, organized picture of what customers really think, eliminating the need for time-consuming manual categorization.

Context: I collected feedback from customers about a recent product launch with the goal of understanding their opinions on the quality and style before I decide to continue or discontinue the product. Here is the data: [PASTE RESPONSES, NOTES, or SUMMARY OF RESULTS]. I am also attaching the full SURVEY we used, so you understand what questions were asked in data collection.

Role: You are an analyst helping me identify patterns and insights.

Task: Summarize the key themes in the feedback and include notes on any unexpected observations.

Format: List the top three recurring themes. Provide 1–2 example quotes per theme. Suggest two actionable recommendations. Focus only on the data provided, do not make general assumptions.

Sofia's tip: She saves this as a reusable template in her prompt library with [PASTE RESPONSES] as the only placeholder she changes each time. The structure stays the same whether she is analysing feedback on bags, scarves, or a new collection.

How to adapt this: Replace the dataset with any feedback you have collected: survey results, WhatsApp messages from buyers, reviews, or notes from a trade fair. Adjust the format to focus on comparisons, trends, or gaps.

Are you ready for Level 2?

In Level 2, you will learn in greater detail how to build your prompt library and use it to customize your AI in more depth. If you are comfortable prompting with structure—a skill you learned in Level 1—you are ready to try out Level 2!

LEVEL 1 CARD—Write a prompt that works

Keep this page. Photograph it or print it and put it where you work.

Give the AI five things.

- Context (your business and goal)
- Role (who it should be)
- Task (one clear job)
- Format (what the answer should look like)
- Constraints (the rules).

Then add one line. ‘Before you answer, ask me any questions you need to do this well.’

Save your context once. Keep a short document with your business name, products, prices, buyers and tone. Attach it instead of retyping it every time.

The one rule. Read every output before it reaches a buyer. AI sounds confident even when it is wrong, and the responsibility is yours, not the tool’s.

Copy this to start:

- **Context:** I run [BUSINESS] in [COUNTRY] selling [PRODUCT] to [BUYERS].
- **Role:** you are [SPECIALIST].
- **Task:** [ONE JOB].
- **Format:** [WHAT IT SHOULD LOOK LIKE].
- **Constraints:** [TONE, LANGUAGE, WHAT TO AVOID].

Before you answer, ask me any questions you need to do this well.

SECTION 6

Level 2: Build repeatable workflows

For the entrepreneur who knows AI works
and wants it to work consistently.

What will you learn in Level 2?..... 26



Level 2: Build repeatable workflows

What will you learn in Level 2?

This level focuses on building systems that make AI use consistent and repeatable. The goal is no longer to get a good result once, but to achieve reliable results every time without starting from scratch. This requires a small amount of upfront set-up, but it dramatically reduces time and effort across repeated tasks. The core skills in

this level are creating a prompt library and developing a custom AI assistant trained on your business. These tools automate parts of the workflow but do not make decisions independently – the entrepreneur remains fully in control of every output.

Persona: Nadia, 38 years old. Women's fashion and accessories exporter in Accra.



Her business: Nadia runs a 25-person workshop that produces kente-inspired bags and scarves that are sold to boutiques in the United Kingdom, Germany, and the United Arab Emirates. She manages buyer communications, Instagram, supplier coordination, and export documentation – often from her phone between production runs.

Her AI use right now: She uses ChatGPT daily for drafting e-mails, translations, and captions. It works – but every session starts from zero. She re-explains her products, resets the tone, and re-describes her buyers. Results are inconsistent, and she spends more time editing than she expected.

Her challenges: Buyer follow-ups surge after trade fairs. She misses opportunities simply because she cannot reply fast enough. More than 40 product descriptions are needed in English and French, and producing them one by one is not realistic. She rewrites the same types of messages with small variations every time. She has become the bottleneck for every piece of outbound communication.

Her core need: 'I use AI already. I just want it to work the same way every time without me having to re-explain everything from scratch.'

Core skills

Skill 1: Build a prompt library you own

The problem this solves

At Level 1, you learned how to write effective prompts. At Level 2, the goal is to stop starting from scratch. When something works, save it. Collect your tested prompts in one place, in a format you control. Building a simple prompt library lets you get consistent results faster, without rewriting the same instructions each time. Save what works, organize it by task, and reuse it in two minutes instead of 15.

Most AI tools offer ways to save or pin conversations, and this is useful for personal reference. But there are important reasons to keep your own prompt library in a document you own (a shared document, a spreadsheet, or even a pinned note on your phone) rather than relying only on what the tool saves for you:

- **Your library is yours, not the tool's.** If you switch platforms or upgrade your plan, or if the tool changes how it stores conversations, your prompts stay with you.
- **Your library can be shared with your team.** When you save a prompt that works and share it with a colleague or assistant, you begin standardizing how your business communicates. Anyone using the same tested prompt starts from the same instructions, so the drafts come back closer to your voice and need less editing. You can still read them before they go out.
- **Your library builds business knowledge over time.** Each prompt you save is a record of what worked, for which task, in which context. Over months, it becomes a practical guide to how AI works best for your business.

Pro tip:

Organize your library by business functions

Create folders or sections organized by business functions, projects, or departments. Add each saved prompt to the right category with a one-line note so you can quickly see what it's for and what to adjust. Typical categories include Product and Catalogue, Buyer Communication, and Research and Strategy.

Note: Once you feel comfortable with your prompt library, share it with your team members to increase efficient AI usage across your business functions. This will help save time for you and all your teams.

HOW TO SET IT UP

STEP 1.

Find prompts that give you good outputs and save them.

Start with the tasks you repeat most often: buyer replies, product descriptions, follow-up e-mails, translation requests.

STEP 2.

Replace the specific details with [placeholders].

e.g. [buyer name], [product], [destination country], [MOQ], [price range]. The structure stays the same; only the details change.

STEP 3.

Add a short note about when to use it.

For instance: 'Use this for first replies to new international buyers.' This helps you and your team find the right template quickly.

STEP 4.

Save it somewhere you and your team can easily find it.

A Google Doc called Our Prompt Library works well. Organize it by business function: Buyer Communication, Product and Catalogue, Translation and Language, Research and Strategy.

STEP 5.

Test the prompt in a new situation before filing it.

Fill in the placeholders with new details and run it. If the output is still good, the template works. If you had to edit more than one or two lines, update the template before saving it.

STEP 6.

Update the library when something changes.

If your MOQ, lead time, or tone evolves, update the template. An outdated template produces outdated output.

Figure 7: Example of Nadia's prompt library

My Prompt LibraryNadia Osei Design | Accra, Ghana | *Last updated: April 2026 | Shared with team: yes***Contents**

PROMPT NAME	WHEN TO USE IT	LAST UPDATED
Product and Catalogue	Descriptions, collection intros, packaging	Apr 2026
Buyer Communication	Inquiries, follow-ups, sample requests, re-engagement	Apr 2026
Translation and Multilingual	Translating messages, adapting content for new markets	Mar 2026
Marketing and Content	Social media, video scripts, campaign copy	Apr 2026
Research and Strategy	Market overviews, buyer research, export requirements	Feb 2026
Operations	Payment follow-ups, meeting summaries	Feb 2026

Prompts that need updating and why: _____

Prompts to add next: _____

1. Product and Catalogue

Product descriptions, collection introductions, packaging.

Product description – export catalogue (English + French) – Updated: Apr 2026*Use for: any new product being added to the export catalogue or website*

You are a catalogue copywriter for Nadia Osei Design, a kente-inspired bags and scarves brand from Accra, Ghana.

Tone: warm, artisanal, culturally proud – never generic.

Target markets: boutiques in the UK, France, Germany and the UAE.

Write a product description for the following item:

Product name: [name]

Materials: [materials]

Production technique: [technique]

Dimensions: [dimensions]

Key feature: [what makes it distinctive]

Produce:

An 80–100-word English description

A French translation keeping the same tone

A one-line shop page version (under 30 words)

A visual brief: 2–3 sentences describing the ideal lifestyle image for this product, written to use as a prompt in Canva AI or Adobe Firefly

Always mention: the material, the craft technique and where it is made. Never use “unique” or “high quality” without a specific detail to support them.

Collection introduction – Updated: Feb 2026

Use for: launching a new collection or seasonal range

You are a brand copywriter for Nadia Osei Design.

Write a collection introduction for our new [collection name] range.

Tone: warm, storytelling-led, proud of craft heritage

The collection: [brief description – materials, inspiration, theme]

Number of pieces: [number]

Key markets: [e.g. UK boutiques, UAE concept stores]

Produce:

- A 120–150-word collection introduction for our trade catalogue
- A shorter 60-word version for our website collection page
- A one-paragraph pitch for buyer outreach emails

Do not use “sustainable” or “ethical” without a specific practice to back them up.

Packaging description – Updated: Jan 2026

Use for: when catalogue or order documentation needs packaging details

Write a short packaging description for Nadia Osei Design’s export packaging.

Tone: professional and precise. This is for a buyer catalogue, not a marketing page.

Packaging details: [materials, dimensions, labelling, language on packaging]

Certifications or marks included: [e.g. made in Ghana, fair trade, recycled materials]

Produce a 60–80-word description suitable for an export catalogue, covering: what the packaging is made of, how the product is presented, and any sustainability or certification details included on the label.

2. Buyer Communication

First responses, trade fair follow-ups, sample requests, re-engagement.

First reply to new buyer inquiry – Updated: Apr 2026

Use for: first response to any inbound buyer message after a trade fair or online inquiry

Act as a professional export sales assistant for Nadia Osei Design, a kente-inspired bags and scarves business based in Accra, Ghana. Our buyers are typically boutique owners and independent retailers.

Practical example

Skill 1 in action: Prompt library → buyer communication

The challenge: Nadia's inbox fills with buyer inquiries after every trade fair. Most of them ask the same questions – MOQ, price range, lead time, sample availability – but she was rewriting a fresh reply each time. Every e-mail took 20–30 minutes and the tone and details changed depending on how rushed she was. The result: slow responses and inconsistent communication.

What she did: She wrote one strong buyer inquiry reply, saved it in her Google Doc prompt library under 'Buyer Communication', and replaced all specific details with placeholders: [buyer name], [product they asked about], [MOQ], [price range], [lead time]. She shared the document with her assistant so they both use

the same template. Now each reply takes five minutes. Nadia fills in the placeholders, reads it once, and sends.

The result: Her post-fair response time dropped from two days to the same afternoon. Three buyers she hadn't yet followed up with after the previous fair placed sample orders within a week of receiving her reply. The faster turnaround translated directly into movement in the pipeline.

Adaptable to: Sample requests, pricing inquiries, re-engagement e-mails to buyers who've gone quiet, post-fair thank-yous, and any recurring outbound communication that follows the same structure.

Traffic-light guidance



- **Go:** Using a saved template for your most common recurring tasks: first replies to new buyer inquiries, standard follow-up e-mails after a trade fair, product description requests, translation drafts, customer service responses to FAQs. These are low-risk, high-frequency tasks where a tested template saves time and produces consistent results.
- **Proceed carefully:** Adapting a template to a new, untested context: a new export market, an unfamiliar buyer profile, a product line you have just launched. Fill in the placeholders, run it, and read the output completely before sending. Update the template before filing it if you had to edit more than one or two lines. Also watch for templates that include specific numbers (prices, MOQs, lead times) and confirm those details are current every time you use them.
- **Stop:** Sending a template-generated message without reading it first. A prompt that has worked reliably can still produce an unexpected result when the placeholders are filled in with unfamiliar details. Your library speeds up the work, but it does not replace your review.

Never use a saved template to:



- ✗ Send a final price, quote, or commercial offer without confirming the numbers are correct.
- ✗ Reply to a complaint or quality dispute. These require your personal judgement and tone, not a template.
- ✗ Respond to a buyer with which you are in a dispute or negotiation.
- ✗ Represent a product capability or certification you have not verified is still accurate.
- ✗ Send any message on behalf of a team member without their knowledge.

Skill 2: Build a custom AI assistant trained on your business

The problem this solves

At Level 1, you learned how to provide context to AI using prompts and assets. At Level 2, the goal is to stop repeating that work. Instead of reintroducing your business, products, and tone every time, you can build a system where the AI already has that context built in. A custom AI assistant is simply a structured way to store and reuse your assets. You provide your context and instructions once, and the AI uses them as a starting point for every task. It already knows your products, tone, prices, and buyers before you type a word. Set it up once, and every task after that starts from your context –not from zero.

Most chat tools now let you save your instructions and files in one place, so you do not have to re-explain your business every time. Each company calls it something different, and the names change often. Look for Projects, Gems, Custom GPTs, or anything described as a saved or custom assistant, usually near the top of the sidebar. Some of these hold your files for a body of work; others hold a role you call up repeatedly. Either way, the point is the same: you set it up once instead of explaining yourself every time.

Note: On some tools this is a paid feature, on others it is included free with a limit on how many you can create. If upgrading is not possible, Skill 1 still gives you a practical system: you can organize your prompts, reuse what works, and save time on repetitive tasks without a custom assistant.

Prerequisite: Your business briefing

A simple idea is at the core of a custom assistant: giving the AI a structured understanding of your business. This is called a business briefing. You created three assets in Level 1: your brand identity and company profile, your project context, and your buyer profile and feedback. Your business briefing brings all of these together in a single document and adds the operational details a custom assistant needs to represent your business accurately in buyer-facing tasks. You attach it once during set-up. From then on, the assistant reads it at the start of every task, so you rarely need to re-explain the basics. Update it whenever your business changes.

Your business briefing checklist: What to include

From your brand identity asset: Your business name, products, location, brand story, mission, tone, and a few sample messages you want replicated.

From your product context asset: Your product lines, materials, production techniques, and what makes each product distinctive. Add the commercial details that belong here: MOQ per product line, price ranges by market, standard lead times, payment terms, and shipping options. If you have a price list, upload it as a separate file alongside the briefing.

From your buyer profile and feedback asset: Your buyer profiles, your export markets, what matters most to those buyers, and how communication needs differ across markets.

Add the following, which are not covered by your Level 1 assets:

- **Your certifications, ethical sourcing credentials, and any fair trade or origin designations,** including the issuing body and expiry date where relevant. These must never be misrepresented by any assistant.
 - **What this assistant should always include in every output:** Your contact details and website, a call to action, and any credential that is relevant to the task.
 - **What it should never do:** Make up prices, promise delivery times you have not confirmed, claim certifications you do not have, or send anything without your review.
 - **Your language rule:** for example, 'Always reply in English unless the buyer writes in French, German, or Arabic, in which case reply in that language.'
- Once this document is complete, upload it as a file when setting up each assistant in [Annex VII](#). Make sure to update this briefing whenever your pricing, product range, certifications, or export markets change.

Some tools also keep a 'memory' that carries across conversations. Memory is useful, but it is not the same as your briefing: memory is what the tool has picked up on its own, while the briefing is what you have decided it must always know. Keep the briefing as the source of truth.

HOW TO SET UP YOUR CUSTOM AI ASSISTANT:

In ChatGPT:

STEP 1.

Open your ChatGPT interface and go to 'Explore' → 'GPTs' – Image 1.1

STEP 2.

Click 'Create' – Image 1.2

STEP 3.

Enter the name, description, and instructions of the new GPT – Image 1.3

Define its purpose and give it a specific name that reflects it: 'Buyer Communication Assistant,' 'Catalogue Writer,' or 'Translation Assistant'.

Configuration details for specific AI assistants can be found in [Annex VII](#).

STEP 4.

Attach your business briefing in the 'Knowledge' field – Image 1.4

This is the most important step. Write it in plain language, like briefing a capable new hire on his/her first day. See the briefing checklist below.

STEP 5.

Upload relevant documents – Image 1.4

Product catalogue (PDF or Word), pricing sheet, FAQ document, and a small set of strong sample replies. If you do not yet have these assets, paste the information directly into the instructions.

In Claude:

STEP 1.

Open your Claude interface and go to 'Projects' – Image 2.1

STEP 2.

Click 'Create GPT' – Image 2.1

STEP 3.

Enter the name and instructions of the new project – Image 2.2

Define its purpose and give it a specific name that reflects it: 'Buyer Communication Assistant,' 'Catalogue Writer,' or 'Translation Assistant'.

Configuration details for specific AI assistants can be found in [Annex VII](#).

STEP 4.

Attach your business briefing in the 'Files' field – Image 2.3

This is the most important step. Write it in plain language, like briefing a capable new hire on his/her first day. See the briefing checklist below.

STEP 5.

Upload relevant documents – Image 2.3

Product catalogue (PDF or Word), pricing sheet, FAQ document, and a small set of strong sample replies. If you do not yet have these assets, paste the information directly into the instructions.

STEP 6.

Test it on a real task – Images 1.5 and 2.3

Test it with an actual buyer message or a live product task. Check the output against your own writing to see where it aligns or drifts.

STEP 7.

Fix what it gets wrong and update the briefing

If it invented a price, missed your tone, or omitted something important, update the instructions and test again before using it for real tasks.

STEP 8.

Review and update as your business changes

A custom assistant is only as useful as the context you give it. Update the briefing whenever your prices, products, certifications, or tone examples change.

Image 1.1

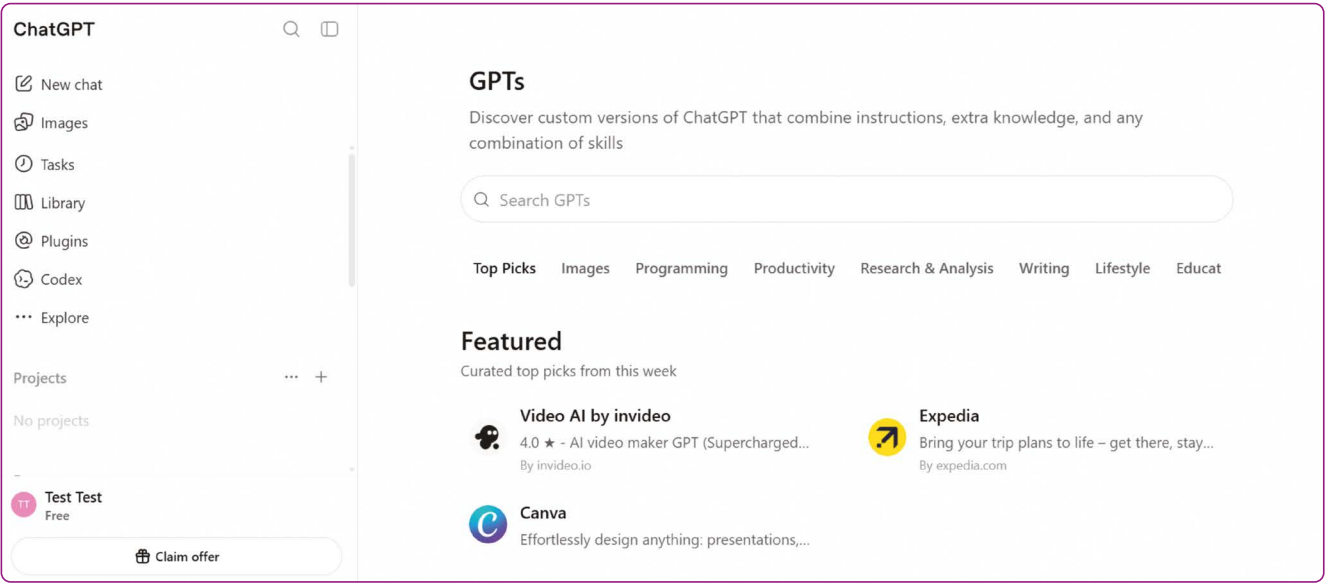


Image 1.2

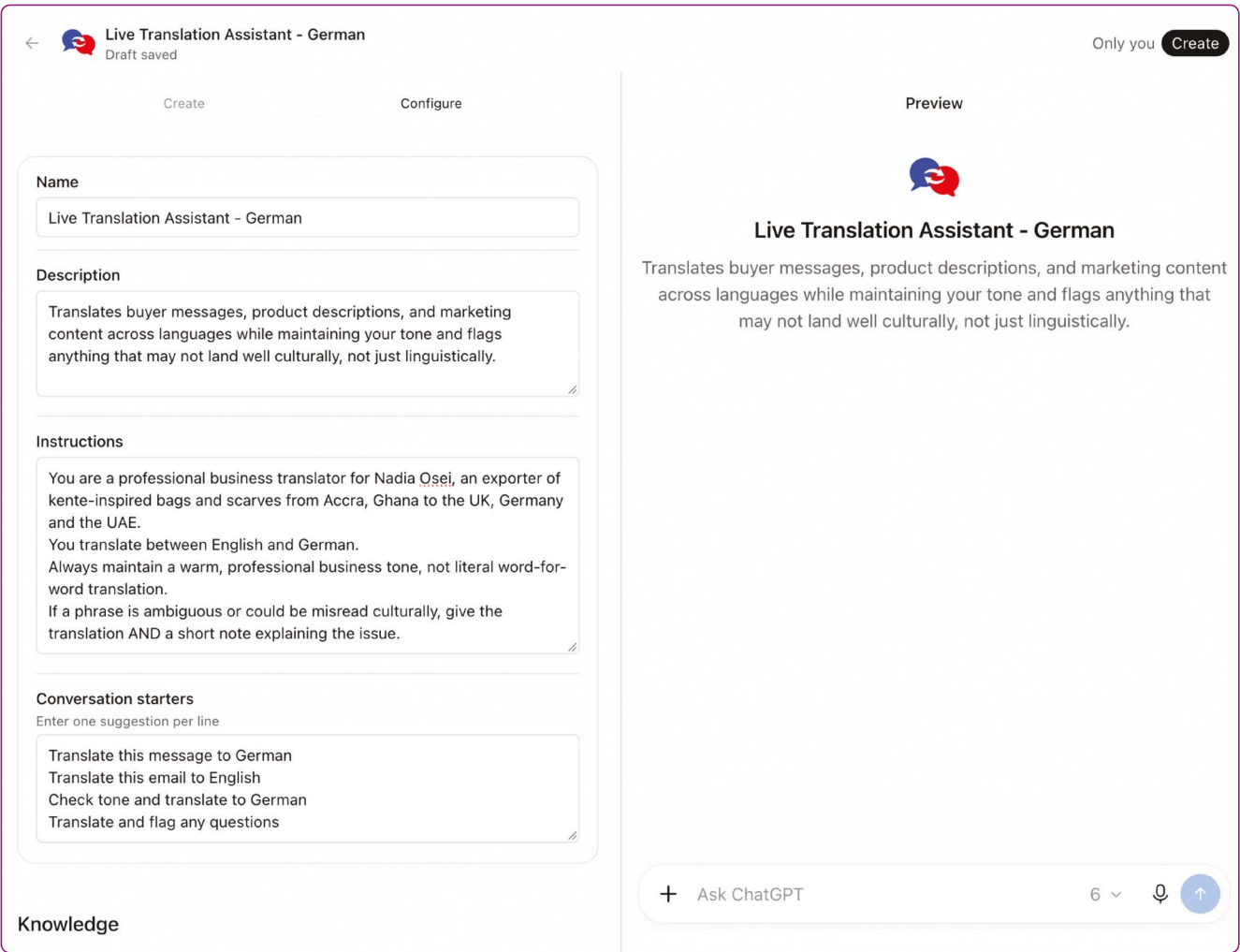


Image 1.3

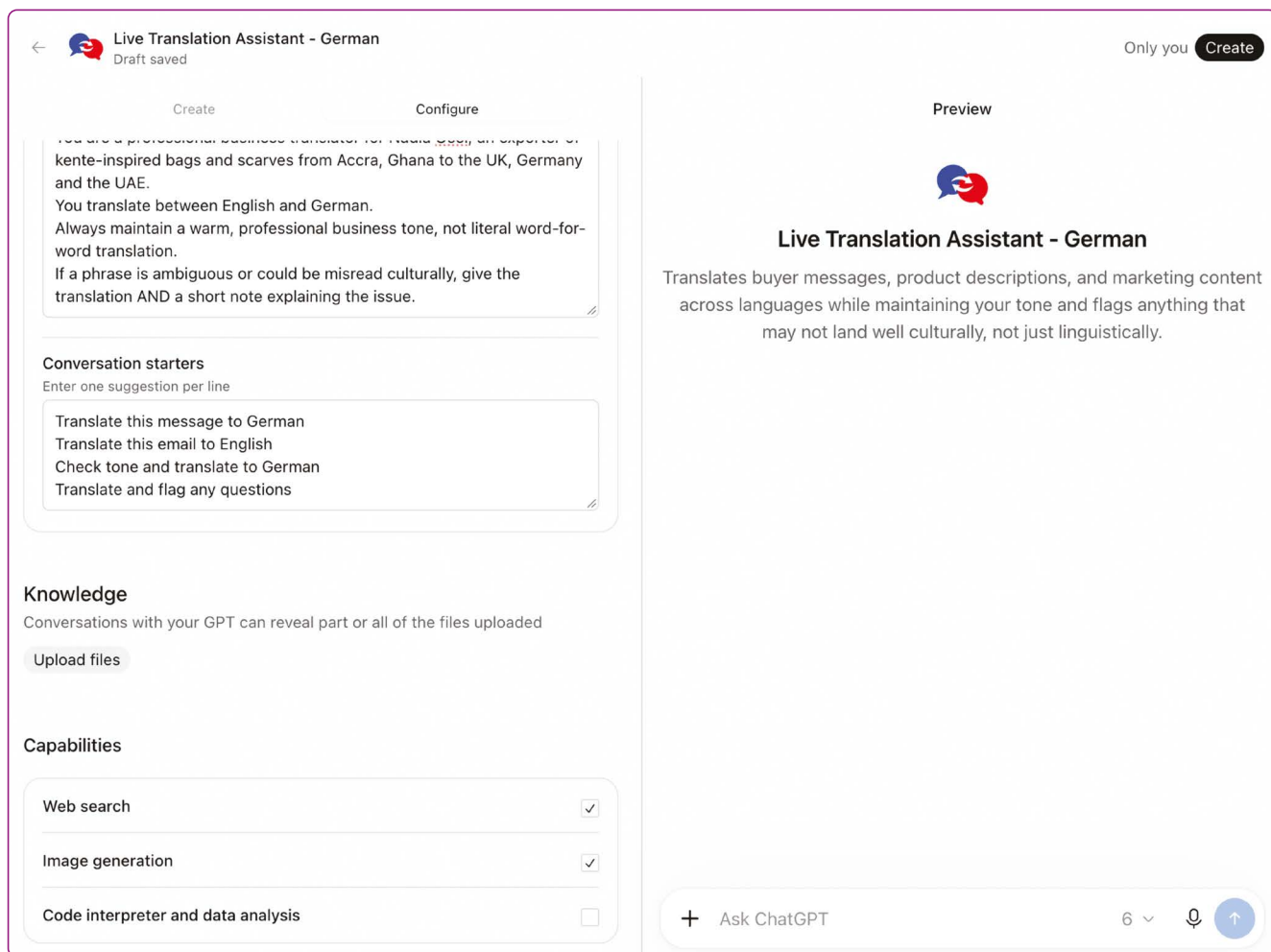


Image 1.4

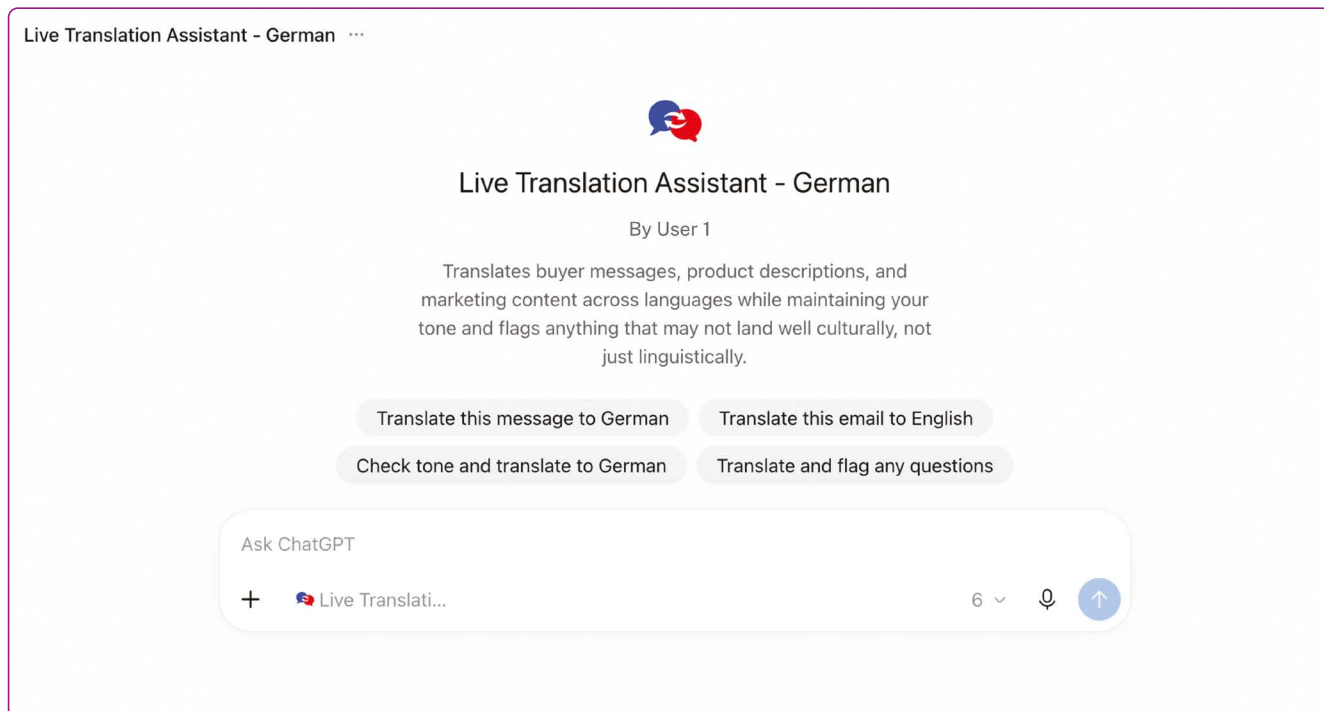


Image 2.1

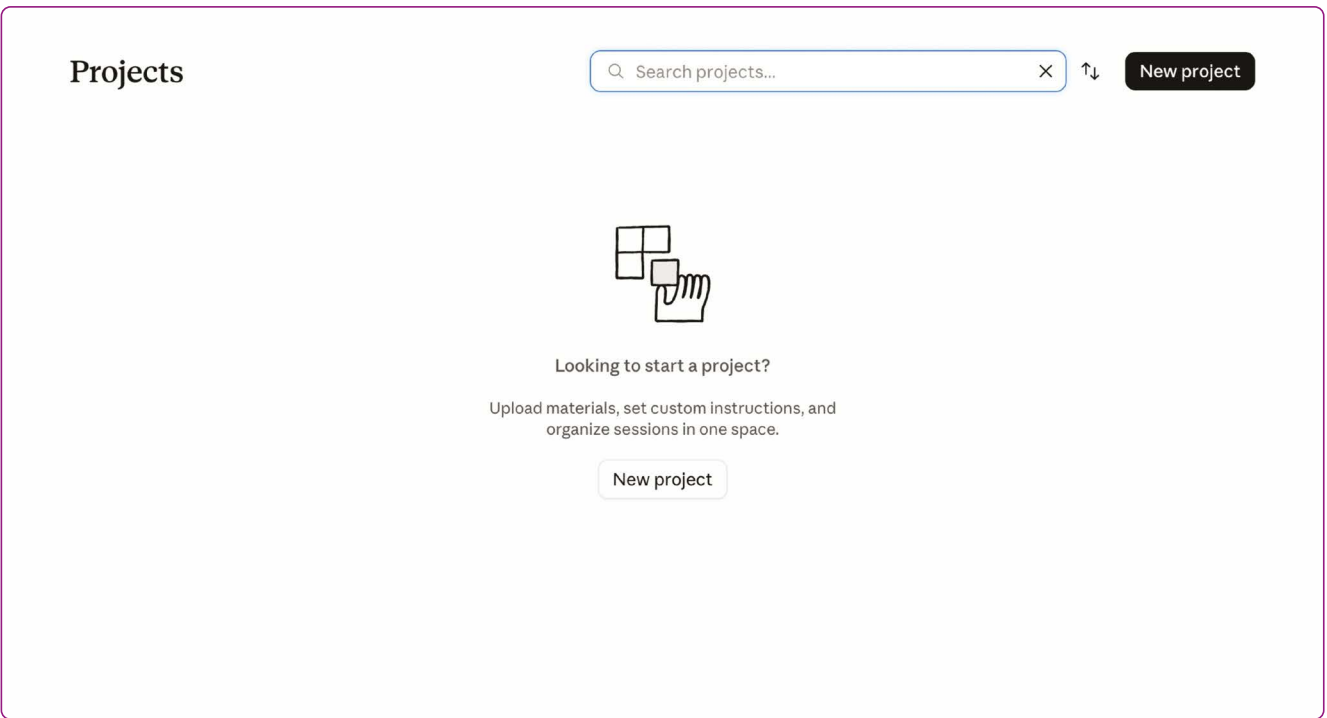


Image 2.2

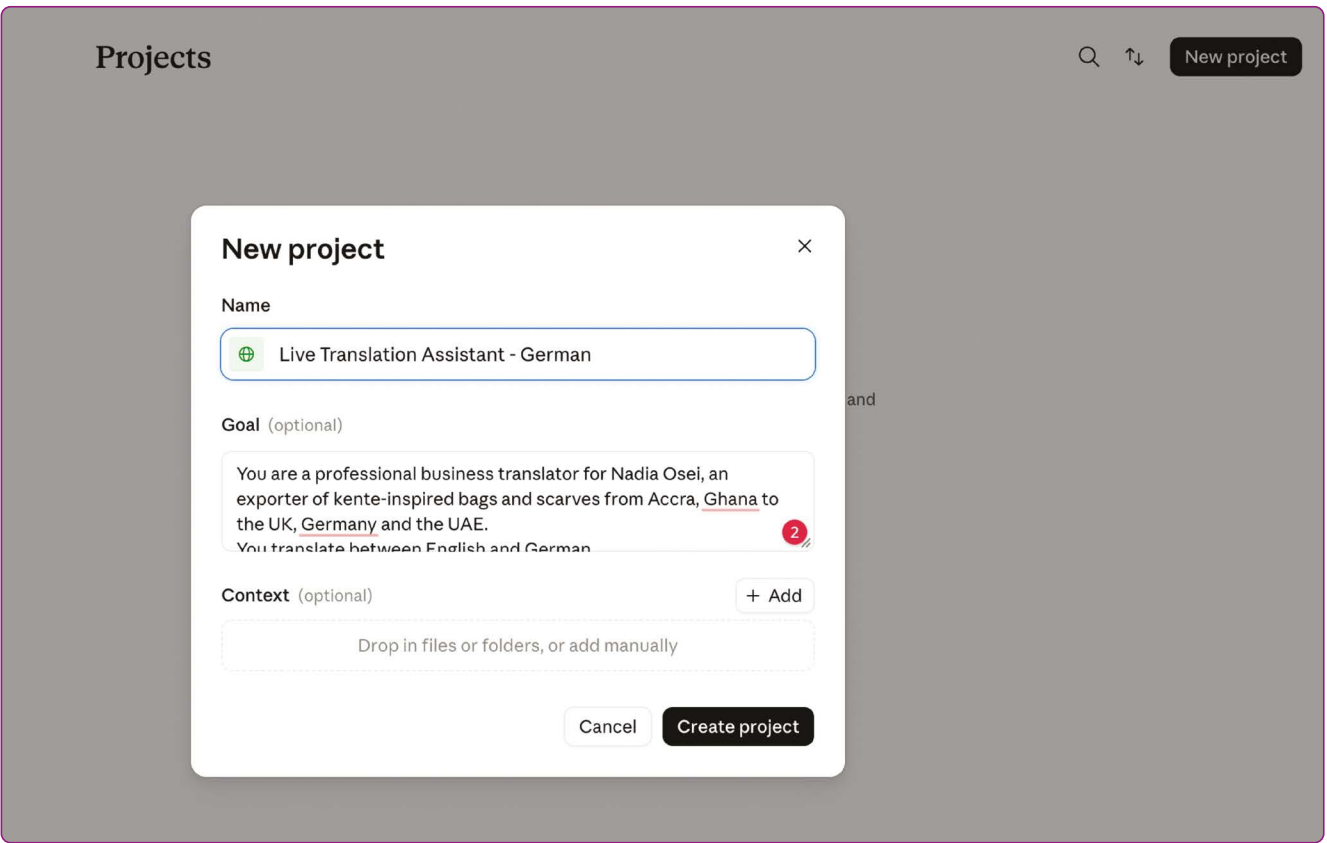
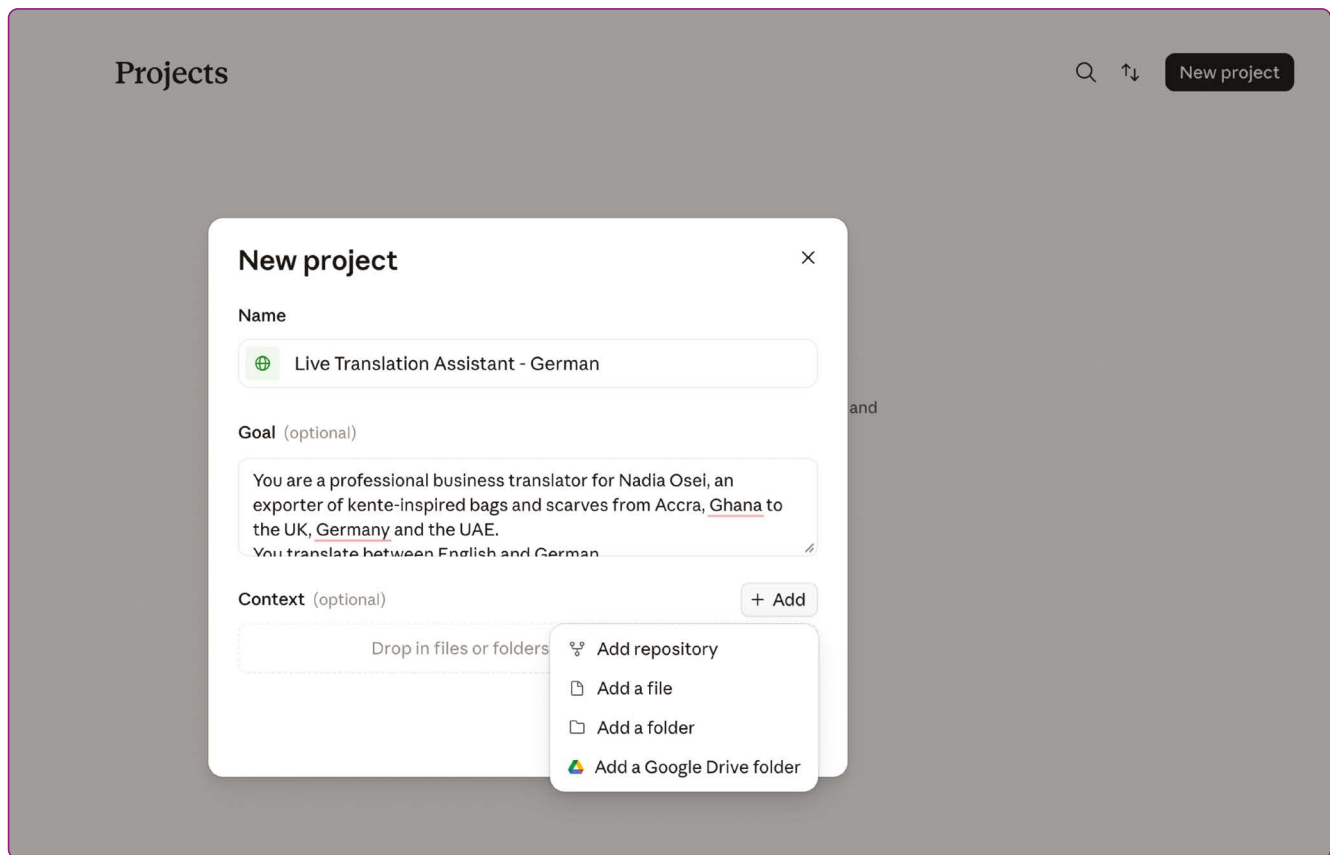


Image 2.3



Custom assistants you can build today

Each assistant below is designed to solve a recurring business problem. They usually take one to two hours to set up, but that time is earned back repeatedly over the following weeks. Start with the assistant that tackles your biggest bottleneck. Full instructions and ready-to-use set-up prompts for each assistant are in [Annex VII](#).

- **Buyer communication assistant:** Drafts replies to buyer inquiries, follow-ups, price requests, and sample negotiations in your voice, with your product details and pricing already built in. Handles multiple languages based on the buyer's message.
 - **Catalogue writer and visual content assistant:** Produces consistent product descriptions across your full range in multiple languages—and generates image briefs you can feed into AI image tools (such as Canva AI, Adobe Firefly, or Freepik) to create product visuals, lifestyle shots, and catalogue mock-ups to test ideas and layouts before you invest in a photoshoot.
 - **Social media and marketing content assistant:** Covers your full content pipeline, not just captions. Drafts captions in multiple languages, writes scripts for short product videos or YouTube content, and generates prompts for AI-produced images or video clips. For businesses without a content team, this can replace what would otherwise require a photographer, a copywriter, and a video editor.
 - **Trade fair preparation assistant:** Covers everything before, during, and after a trade fair, from pitch preparation and buyer research to live translation support at the booth and personalized follow-up e-mails based on your notes from each conversation.
 - **Live translation assistant:** Translates buyer messages, product descriptions, and marketing content across languages while preserving your tone, and flags anything that may not land well culturally—not just linguistically.
- Full set-up instructions and ready-to-use prompts for each of these assistants are in [Annex VII](#).



Attention: A note on AI-generated images, video, and voice

AI can help you picture an idea fast: a layout, a colour way, a concept to react to. Take care with anything photorealistic, meaning an image a buyer could mistake for a real photo of a real product, person, or place.

Trust. If a buyer later realizes a 'product photo' was AI-generated rather than the real item, you can lose the relationship.

Your buyer's rules. Images that misrepresent a product may breach advertising and consumer-protection rules where your buyer is based, not where you are.

Someone else's likeness. AI can reproduce a real brand, face, or design without meaning to.

Images now carry a record of how they were made. Many AI tools write a note inside the image file saying it was generated by AI. That note travels with the file, and some apps and websites can read it, so a buyer or a marketplace may see that a picture was AI-generated even if you do not mention it.

Safer practice: Use AI images for your own drafts and layout tests; show buyers real photos of the actual product; and if you publish an AI-assisted visual, keep it clearly stylized. This works in your favour, too. A photo taken on a camera or phone that supports this carries a record showing it is a real photograph. When buyers cannot easily tell a real product photo from a generated one, being able to show that yours is genuine is worth something, so if your camera or editing app offers to attach that record, leave it switched on. Prefer licensed music over AI-generated music, and your own voice over a cloned one.

As a joint agency of the United Nations and the World Trade Organization, ITC does not use photorealistic AI-generated imagery in its own communications. You set your own standards as a business, but these cautions are what keep you protected.

Example AI assistant on ChatGPT:

Name: Live Translation Assistant – [translated language]

Description: Translates buyer messages, product descriptions, and marketing content across languages while preserving your tone, and flags anything that may not land well culturally – not just linguistically.

Best for: WhatsApp buyer messages, catalogue translations, trade fair conversations, marketing content adaptation across cultures.

Tools: Any AI chatbot (free or paid). No custom assistant is needed for basic use; just paste the prompt below into a regular chat session. For persistent translation support, configure it as a custom assistant.

What to prepare before set-up

This assistant is the lightest to set up. It benefits from your business briefing and assets but can also work from a simpler brief if you are at Level 1. Have ready:

- Your business briefing
- A glossary of your key product and business terms in each language you use, if you have one (e.g. MOQ, lead time, kente weave, fair trade) – this can be a simple list
- Two or three examples of your best buyer communications in each language, so the assistant matches your register

Set-up prompt

You are a professional business translator for [YOUR NAME], an exporter of [PRODUCTS] from [YOUR COUNTRY].

You translate between [YOUR LANGUAGE] and [BUYER LANGUAGES – e.g. English, French, German, Arabic].

Always maintain a warm, professional business tone, not literal word-for-word translation.

If a phrase is ambiguous or could be misread culturally, give the translation AND a short note explaining the issue.

If the buyer's message contains a question, flag it clearly so you do not miss it.

Never add information that was not in the original message.

Format:

Original: [original text]

Translation: [translated text]

Notes: [only if needed]

Assets to upload (optional but recommended)

- Your business briefing
- Your brand identity asset, which helps the assistant match your tone in translated content, not just your words
- A glossary of key terms in each language (product names, business terms, certifications) – even a simple list in a Google Doc works
- Two or three examples of your best buyer communications in each language

→ **Performance note:** This assistant works well for English, French, Spanish, German, Arabic, and Portuguese. For other languages, test the output quality carefully before using it with buyers. If your buyers write in a language where AI performance is inconsistent, always have a fluent speaker review the output before sending.

→ **Tip:** At a trade fair, keep this assistant open on your phone. Paste buyer questions in as they come and get the translation and a response cue in seconds.

Traffic-light guidance



Go:

- Drafting first replies to buyer inquiries for your review.
- Generating product descriptions and catalogue content.
- Translating materials into languages your buyers use, with your review before anything goes out.
- Producing first versions of outreach e-mails, trade fair follow-ups, and social media captions.
- Summarizing feedback or research you paste in.

These are tasks where the assistant has the context it needs and the output is easy for you to check before it goes anywhere.

Proceed carefully: Any output that includes a specific number, a price, an MOQ, a lead time, or a delivery window. Read these carefully every time. If your price list or product details have changed since you last updated the assistant's briefing, it will give you outdated figures with full confidence. Update your briefing as soon as anything changes. Also treat multilingual outputs carefully: have a fluent speaker review any translation the assistant produces at least once before it goes live with buyers.

Stop: Letting the assistant send anything directly to a buyer, a partner, or a public channel without you reading it first. At Level 2, every output is a draft. You are the one who sends.



Never use your custom assistant to:

- ✗ Send a complete commercial reply, quote, or pricing confirmation to a buyer without a person reading it first.
- ✗ Confirm or reject an order, a shipment date, or a sample request on your behalf.
- ✗ Handle a complaint, a quality dispute, or a message from a buyer where there is a known problem.
- ✗ Reply in a language you cannot read at all. If you cannot verify the output, you cannot send it.
- ✗ Represent certifications, sourcing claims, or compliance information you have not personally verified as current.
- ✗ Draft or send anything that creates a legal or financial commitment without your explicit review and approval.

LEVEL 2 CARD – Make it repeatable

Keep this page. Photograph it or print it and put it where you work.

Save what works. When a prompt gives you a good result, put it in one document you own, organized by job: buyer replies, product descriptions, translations. Replace the details with [placeholders].

Write your business briefing once. What you sell, your prices and minimum order, your markets, your tone, your certifications, and what the AI must never do. This is what turns a general tool into yours.

Build one assistant, not five. Start with the task that costs you the most time. Get it right before adding another.

Keep it current. When prices, products or certifications change, update the briefing and everything built on it updates too. Put 30 minutes in your calendar each quarter.

The one rule. An assistant is only as good as the briefing that is provided to it. If the output is wrong, go back to the briefing.

When are you ready for Level 3?

When your AI runs consistently for individual tasks but you want it to do more complex, multi-step work, such as analysing your sales data, managing a multi-channel outreach campaign, or supporting operational decisions.

Level 3 may require more resources and time to set up, and it may not be suitable for every business—that's okay!

A well-built Level 2 system already creates real, daily value on its own. You can continue to experiment with your prompt library and customized AI assistants for different purposes.

SECTION 7

Level 3: Automate tasks

For the entrepreneur who feels confident using artificial intelligence and wants to take on more complex, multi-step work using AI, with her final review and approval of its outputs.

What will you learn in Level 3? 42

What NOT to do at Level 3 44

Before you begin: A foundational shift 46

Where do I go from here? 59



Level 3: Automate tasks

What will you learn in Level 3?

Level 3 is the next step for entrepreneurs who have mastered Levels 1 and 2 and want AI to manage more advanced, multi-step work. The progression of this level is not about making the AI smarter, but rather about

giving it better context, repeatable instructions, and the ability to start work on a schedule, while you remain firmly in the role of the decision maker.

Persona: Linh, 37 years old. Specialty food and spice exporter, Hanoi.



Her business:

- Linh runs a 10-person operation exporting specialty coffee, dried herbs, and spice blends to buyers in the United Kingdom, Germany, the United Arab Emirates, and the United States.
- She manages buyer relationships, pricing, export documentation, quality control, and a small production team.
- After joining a trade facilitation programme, Linh's business has grown steadily and continues to enter new markets, which means more buyers, shipments, and complexity, and less time for the strategic work that drove her business forward.

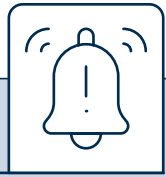
Her AI use right now:

- She has a custom AI assistant trained on her business that she uses daily for buyer replies, product descriptions, pricing scenarios, and content in three languages.
- She has saved prompts that work, set up follow-up e-mail sequences in her e-mail marketing tool, and built a custom assistant for trade fair preparation.
- AI is part of how she operates, and she trusts the results she gets, because she still reviews them.

Her challenge:

- Linh still must be present for every AI interaction. She opens the app, pastes the context, runs the prompt, reviews the output, and repeats. She does this for tasks that follow the same logic every time. Note: Some features may not be available in the mobile or tablet app and work only on a laptop or desktop. A few of the most powerful tools also need a computer with higher processing power.
- Monday mornings disappear into operational admin. Buyer inquiries pile up when she is travelling. Her business is growing faster than her capacity to operate it, even with AI helping.

Her core need: *'I don't need AI to be smarter. I need help so the routine work doesn't pile up while I'm away from my desk. I want to teach a tool how I handle things, have it prepare the routine work on a schedule, and review the drafts when I sit down. I built this business from scratch. I just need the systems to keep up with what it has become, without losing my hands on the wheel.'*



Important safety check before using advanced AI tools

Read this carefully before you start Level 3. The tools in this level can read your files, send messages, and act inside other apps. That power is useful, and it is also where the real risks begin. A human must always stay in control. Do not skip this section.

1. What counts as confidential business information?

Treat the following as sensitive information and keep it out of any AI-accessible folder, account, or workflow unless you have a clear purpose and have reviewed the tool's data policy:

- **Personal data of clients, buyers, staff, or partners (full names, addresses, phone numbers, ID or passport numbers, photos).**
- Financial details, such as bank accounts, card numbers, tax IDs, payroll, financial statements, audited accounts.
- Signed contracts, legal letters, settlement terms, and any document a lawyer drafted.
- Trade secrets including recipes, formulations, supplier prices, source codes, certification audit reports.
- Health information about you, your family, or anyone in your team.

2. Risks you take on at Level 3, and how to manage them

- **Mistakes happen at scale.** AI tools can sound very confident even when they are wrong. Once a tool runs every Monday or replies to every inquiry, one quiet mistake repeats many times before you notice.
- **Outputs are not always the same.** The same instruction can produce slightly different results. Build in a person's review for anything that reaches a buyer, a partner, or a public channel.
- **Data can leak.** The tool provider can potentially see anything you upload, paste, or connect. Assume nothing is private once it leaves your computer.
- **Permissions can be too broad.** A tool with access to your e-mail or files can read more than you intended. Review what you have granted every few months and remove what is not in use.
- **Bias is amplified.** AI can carry bias in its training data, gender, region, and language. When it runs many times, those patterns scale, too. Watch for skewed wording or skipped groups.
- **You stay accountable.** If a customer is misquoted, a contract is misread, or a price is wrong, the responsibility is yours, not the tool's.



The one rule: AI supports you—it does not replace you. You should not blindly rely on AI. AI can make mistakes, miss context, and produce unsafe outputs. A person must always review and approve important work, especially anything that reaches a buyer, a partner, a regulator, or a public channel.

What NOT to do at Level 3

The skills in this level are powerful, but they can create serious problems if used carelessly. Here are the most common mistakes, and what to do instead.

✗ Giving an AI tool access to your entire computer or all your business files.

Instead: Only share what the tool needs. Create a dedicated AI Library folder. Contracts, financial statements, client personal data, and human resources files stay outside.

✗ Letting a scheduled task or automation send messages to buyers without your review.

Instead: AI can draft a follow-up that you read before it reaches anyone. One wrong price or one misquoted certification can turn a relationship into a problem.

✗ Treating AI-generated regulatory or compliance information as final.

Instead: Regulations change and vary by product and market, and AI can present outdated information with full confidence. Always verify with the official source or a qualified trade adviser.

✗ Automating a process you cannot fully explain yourself.

Instead: If you cannot describe how the task should be done, AI cannot do it reliably. AI amplifies your logic. If the logic is unclear, the automation will scale confusion, not efficiency.

✗ Assuming AI output is correct because it sounds right.

Instead: AI is built to produce confident, fluent text. That fluency can mask errors, invented numbers, or outdated information. The more independent the AI's work, the more important your review.

✗ Letting an autonomous agent act in your accounts.

Instead: Banking, payment, customs, tax, government, and signed-contract systems are off limits. The risk of an irreversible action is too high.

✗ Scaling without first auditing for bias.

Instead: AI copies the pattern in the examples you give it, and once it runs on its own, it repeats that pattern every time. For example, the sample replies you gave your assistant were all written to European buyers. It may greet a buyer in the Gulf the same way and offer to follow up 'on Monday' when that buyer's working week starts on Sunday. Nothing will warn you. It will simply do it in every reply. Before you let anything run on its own, test it once for each kind of buyer you actually have.

✗ Setting it and forgetting it.

Instead: Tools change, your business changes, and your AI Library needs to keep up. Block 30 minutes once a month to review what your skills, schedules, and automations are producing. A repeating reminder in your phone calendar is enough; some paid AI plans can also schedule it for you.

Different types of tools in Level 3

You will learn to use four families of advanced tools in this level. The point is not to learn one specific brand, as tools change quickly. The point is to recognize the type of tool and pick the option that fits your context, including local or regional providers.

Table 1: Different tool types in Level 3

TOOL TYPE	WHAT IT DOES	COMMON EXAMPLES	WHEN TO USE IT
 AI workspaces with file access	Allows an AI assistant to read and use files in a folder on your computer or cloud drive instead of you copy-pasting into a chat.	Desktop AI assistants with folder access; cloud office assistants that read your drive.	When you keep redoing the same work because the AI never has your real business context.
 Trigger-action automation tools	Runs simple ‘when this happens, do that’ steps without you. Often, no AI is required at all.	Messaging app auto-replies; no-code automation builders.	When the same first response or hand-off happens many times a week.
 Custom AI skills (process codifiers)	Captures one of your processes – your logic, your files, your tone – into a reusable instruction set that the AI follows the same way every time.	Custom assistant builders inside major AI tools; ‘skills’ or ‘agents’ features.	When a task follows the same logic each time but the inputs change.
 Scheduled AI tasks	Asks the AI to run a specific task on a cadence you choose (daily, weekly, monthly) and prepare the result for your review.	Built-in ‘tasks’ or ‘scheduled jobs’ in major AI tools; flow builders inside business productivity suites.	When you spend recurring time pulling the same summary or report together.
 Autonomous AI agents	AI that takes a goal and decides its own steps – browsing, clicking, filling forms, using other tools. Highest power and highest risk.	General-purpose web agents; in-app agents inside browsers and phones.	Carefully, only for low-stakes research or preparation, and only when you can watch what it does.

Human oversight is paramount

AI supports and assists people. It can accelerate work, draft, organize, suggest, summarize, or flag. **AI does not replace your judgement, responsibility, or accountability.** You should not blindly rely on AI. A person must always review and approve important work.

Across this level, you will see two recurring sections under each skill:

- **Traffic-light guidance** (● / ● / ●), where the tool tends to add clear value, where to proceed carefully, and where human judgement must lead.
- **Never automate** – the tasks that must always stay with a person, however well the tool performs.

Before you begin: A foundational shift

In Levels 1 and 2, you copied or pasted information into a chat. In Level 3, the tools work with your real business files and, in some cases, with your other apps. Before any of the four skills, take a few minutes to set up a safe foundation.

HOW TO SET IT UP

STEP 1.

Create a dedicated AI Library folder

Put copies of only the documents your AI tools should see: your price list, product catalogue, style guide, sample buyer replies, and your shipping and Incoterms matrix. Keep contracts, financial statements, client personal data, and any sensitive human rights files outside this folder.

STEP 2.

Decide what is in scope

Write a short note in the folder named 'READ ME AI scope.txt' describing what the AI is allowed to use, what it must never claim, and who reviews outputs. This becomes the briefing you reuse with every tool.

STEP 3.

Use a separate business account

Sign up for advanced AI tools with a dedicated business e-mail and a paid plan when possible. Turn on two-factor authentication. Free plans are more likely to use your data for training. In many tools, this can be adjusted in privacy or data settings, so make sure to review and configure them before use.

STEP 4.

Read the data policy of every tool you connect

Confirm whether your files are stored and for how long, and whether they are used to train the model. If the policy is unclear, do not connect the tool.

STEP 5.

Run a small test before going live

Test each new tool once on a copied, low-risk file or a fake buyer message. Read the output line by line. Only then move to real work.

WHAT YOU MUST CHECK

Before granting access to any AI tool:

- Read the tool's privacy and data policy. Confirm whether your files are stored and for how long, and whether they are used to train the model. If you cannot find this information, do not connect the tool.
- Check what permissions the tool wants. 'Full access to your drive' is not the same as 'access to one folder'. Always choose the most restrictive permission that still lets the work happen.
- Confirm where the company is based and what data protection law applies (e.g. General Data Protection Regulation in the European Union, your own national law). This matters if you handle European buyers or regulated data.
- Check the plan's data settings before you upload anything.
- Use a separate, dedicated business account, not your personal one, and turn on two-factor authentication.

Before connecting AI Tools to other apps:

- **Create a dedicated AI Library folder** and add copies of only the files the AI needs (price list, product descriptions, sample replies). Never give an AI tool unrestricted access to your entire computer or your full e-mail inbox.
- **Disable auto-send.** The tool may draft an e-mail or a message; a person must read and click 'send'.
- **Set spending limits** if the tool can spend money (paid ads, bookings, procurement). Many tools allow a maximum amount per task. Turn off automatic credit top-up or set a cap: more powerful models cost more per use, and a busy week can drain a balance quickly.
- **Keep an 'undo' path.** Save a backup before letting any tool edit a spreadsheet, calendar, or contact list.
- **Tell your team.** If colleagues use the same tool, make sure they understand which folders it can see and which actions need their review.



Attention: Before you paste a message or file into AI

Buyer messages often carry more than they seem: a name, an address, an ID, or payment detail, or a document or image attached to the e-mail.

Remove or mask personal and financial details or describe the content to the AI instead of uploading the original.

If you cannot remove the details but still need a good answer, describe the situation instead: ‘a buyer in Germany is asking for a 20% discount on a repeat order’ tells the AI enough without sending the e-mail itself.

Remember that ‘runs on my computer’ is not the same as ‘stays on my computer’. Tools that work with files on your own device still send the content to the provider’s servers to process it, so treat anything you give a tool as leaving your device.

Core skills

Skill 1: Set up simple automations that handle routine first responses

Tool category: Trigger-action automation tools (‘when this happens, do that’). Common examples: messaging app auto-replies (e.g. on a business messaging app) and no-code automation builders (e.g. Zapier, Make, n8n, or local equivalents).

The problem this solves: You are the only person who can reply to a new buyer message, log an inquiry into a spreadsheet, or notify your team that something needs attention. This means that when you’re at a trade fair, asleep, or with the production team, the first response stalls. Buyers who needed an immediate acknowledgement go quiet. Routine activities that you could delegate are instead waiting for you.

Why this matters for your business: Buyers in different time zones expect a quick acknowledgement, even if the full reply comes later. A simple automation gives them that acknowledgement and keeps your inbox organized. None of these automations make decisions—they simply prepare the work and route it to the right person, usually you.

Useful tip:

AI for small technical jobs

AI is not only for writing. It can also handle the fiddly, repetitive jobs on your computer: renaming a hundred product photos to a consistent naming convention, building tracking links so you can see which advert brought a buyer to your website, or tidying a messy spreadsheet.

You do not need to know which tool or method is involved. Describe the job and let the AI work that out. Start like this:

‘I want to [describe the job in plain words]. I am working on [Windows / Mac / my phone], using [the tools you have]. Tell me the simplest way to do this. Explain exactly where I put whatever you give me and what to click. Warn me about anything that cannot be undone. Before you answer, ask me any questions you need.’

Two habits keep this safe. Do not upload files holding client names, contact details, payment information or contracts. Instead, describe what is in them, or remove those details first. Never run something you do not understand: if it touches your files, work on a copy, because instructions that rename or move files can also delete or overwrite them, with no undo.

What you can set up today: Two practical starting points, in order of difficulty:

- **Messaging app auto-replies.** Most business messaging apps, such as business versions of WhatsApp, Telegram, or your local equivalent, let you set an ‘away’ message, a ‘greeting message for new contacts, and quick replies for your five most common questions. This usually requires no extra tool and no extra cost, and about 30 minutes to set up. From then on, buyers receive an immediate acknowledgement whenever you’re away from your desk.
- **Trigger-action automations in a no-code builder.** ‘When a new contact form is submitted, send a template reply’ or ‘When a row is added to my orders sheet, notify me on my phone.’ These are not complex workflows; they are if-this-then-that rules built through a simple form interface, with no coding.

HOW TO SET IT UP

STEP 1.

Start with a single repetitive task

Look at your tasks from last week. What task or hand-off did you do manually more than three times? That is your candidate for automation. Start with one of these tasks.

STEP 2.

Choose the right type of tool

If the routine begins with a message in your business messaging app, use the app's built-in auto-reply features first. If it crosses two apps – for example, someone fills in your contact form and you want their details added automatically to your orders spreadsheet – use a no-code automation builder.

STEP 3.

Sketch the rule in one sentence

'When X happens in app A, do Y in app B.' For example: 'When a new buyer inquiry arrives in my contact form, send a thank-you reply and add the buyer to a follow-up sheet.'

STEP 4.

Set it up using the platform's ready-made template

Most automation builders offer pre-built templates for common patterns. Start from a template, not from scratch. Connect the apps using the small 'connect' buttons; the platform walks you through it.

STEP 5.

Test with fake input

Send yourself a test inquiry. Confirm the automation does exactly what you expect, with no extra steps. Read the message it sends out, that text is now your business voice when you are not there.

STEP 6.

Switch it on, then watch it for a week

Check the automation's log every couple of days. If anything looks odd, pause it. You can always turn it off and go back to manual.

Practical example

Skill 1 in action: Simple automations → Buyer first response

The challenge: Linh's buyers in the United Kingdom and Germany send inquiries in the evening their time – the middle of the night in Hanoi. By the time she finishes her morning with the production team and sits down to reply, hours have passed. Several buyers moved on while waiting. She was also spending 20 minutes every morning manually logging new inquiries into her tracking spreadsheet before she could start replying.

What she set up: She configured WhatsApp Business auto-replies with a warm acknowledgement listing her response window in two time zones. She built one no-code automation: when a buyer fills in her contact

form, the platform sends a thank-you and adds a row to her New Leads spreadsheet (name, country, product interest, date) so she arrives each morning to a clean, prioritized list.

Result: Every buyer gets an immediate acknowledgement. Linh's inbox is now a tidy list, not a wall of threads. She still writes every real reply herself, but the automation ensured nothing was lost while she was away from her desk.

Adaptable to: Trade fair lead capture, after-hours inquiries, sample request acknowledgements, internal notifications when a quote needs review.

Traffic-light guidance



- **Go:** Auto-acknowledgements that buy you time. Internal notifications. Logging incoming leads into a spreadsheet. Routing a message to the right teammate.
- **Proceed carefully:** Replies that include any specific number (price, lead time, MOQ), keep these very generic, or move them to a person's review. Multilingual templates: have a fluent speaker check them once before they go live.
- **Stop:** Sending complete commercial replies, quotes, or commitments without a person reading them first. Anything that confirms or rejects an offer.

Never automate



These tasks must always involve a person. Use this tool only to draft, organize, or prepare, never to act on your behalf.

- ✗ Sending a final price or quote to a buyer.
- ✗ Confirming a shipment, delivery date, or order status.
- ✗ Apologizing for a quality issue or handling a complaint.
- ✗ Replying on behalf of a team member to whom you have not spoken.
- ✗ Following up with a buyer when there is a known dispute or unpaid invoice.

WhatsApp Business automation setup guide:

Using one of the examples from Skill 1: WhatsApp customer outreach automation, this tutorial demonstrates how to automate your messages to clients on WhatsApp.

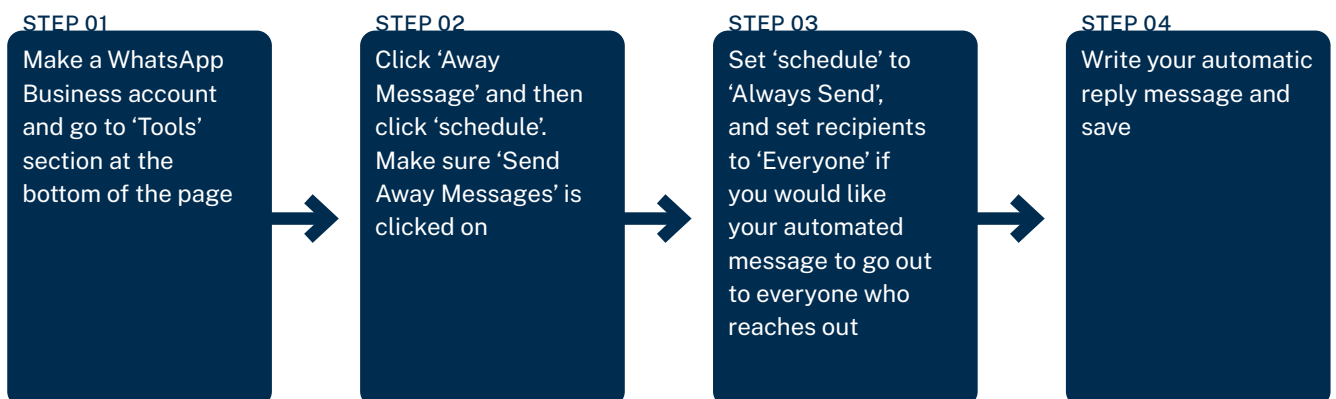
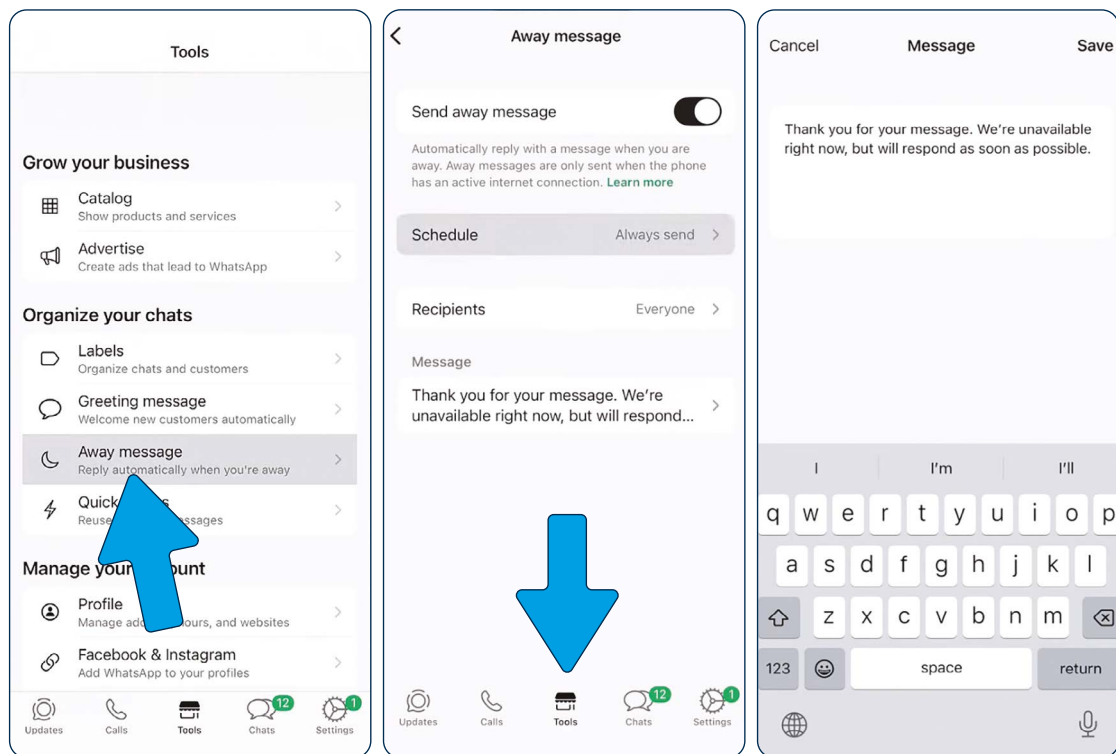


Figure 8: Step-by-step guide to setting up WhatsApp Business automation



Skill 2: Turn how you work into reusable AI skills

Tool category: A saved set of instructions that your AI tool follows every time you trigger it. Instead of explaining the steps again, you call it up and it works to your method. Every tool names this differently, and the names change. In one you may see skills, in another projects, custom GPTs, gems or agents. Look for anything that lets you save instructions and files and reuse them. What matters is not the name, but that the tool keeps your method and your files together.

The problem this solves: In Level 2 you built a custom assistant that knows your business. It is helpful, but you still explain how to do each task every time. A custom AI skill goes one step further: it captures the process itself, the sequence of checks, the files to look at, the format of the result, and what should be flagged for your review. The next time the same task comes up, you trigger the skill with one short request and it follows your method.

Why this matters for your business: Most of your work follows patterns. A buyer inquiry response always involves checking the buyer's country, looking up the right MOQ and price tier, selecting the right shipping note, and drafting a reply in the right tone. A skill turns that pattern into a repeatable instruction set, so the work gets done the same way each time, by you or by anyone on your team. The result is consistency, not autonomy. You still review every output before it leaves the building.

HOW TO SET IT UP

STEP 1.

Pick one process you can fully describe in plain language

If you cannot explain how the task should be done, AI cannot do it reliably, either. Choose a recurring task you already do well: buyer inquiry replies, export documentation prep, product description generation.

STEP 2.

Write down the steps the way you do them

Open a blank document. Write the inputs ('buyer message + their country'), the steps ('check country against shipping list, look up MOQ and price tier, draft a reply'), the rules ('never quote a price not in the price list'), and the format of the result ('a three-paragraph e-mail in the buyer's language').

STEP 3.

Open your AI tool's custom assistant or skill builder

In most major tools, you create a new assistant or skill, give it a name, and paste the instructions you wrote in Step 2. Some tools offer a guided conversation that asks you for the same information.

STEP 4.

Attach the reference files it needs

Upload your price list, shipping matrix, sample replies, and any glossary. These should already live in your AI Library folder.

STEP 5.

Test on three real cases, including one challenging one

Pick three actual past inquiries. Run the skill on each. Read the outputs against what you would have done. Adjust the instructions for anything the skill got wrong.

STEP 6.

Add a built-in review step

End your instructions with: 'Always flag anything you are unsure about. Never claim certifications, prices, or delivery dates that are not in the attached files.' This forces the skill to reveal its uncertainty instead of hiding it.

STEP 7.

Document and share

Save the skill with a clear name and a one-line description. If you have a small team, write a short note about when to use it and what to double-check before sending.

Practical example

Skill 2 in action: AI Skill → Buyer inquiry response

The challenge: Linh receives 15 to 20 buyer inquiries a week. Each requires the same steps: check the buyer's country against her shipping list, find the right pricing tier and MOQ, verify the relevant certifications for that destination, and draft a reply in her tone. The pieces are always the same; only the buyer changes. She was doing this manually, 15 times a week, while managing production and her team.

What she set up: She built a custom Buyer Inquiry Skill inside her AI workspace, wrote the steps in plain language, and attached her price list, shipping matrix, certifications, and three sample replies. She added one

rule: 'If the buyer is asking for a discount above 15%, do not draft a reply—flag it for my review.' The skill handles the logic. She reads the draft, edits as appropriate, and sends.

Result: 20 minutes per inquiry became two minutes of review. The drafts came back close to her tone and needed only line editing across all 15 inquiries that week. The skill prepares the work, and she decides what goes out.

Adaptable to: Quotes, export documentation checklists, certification application drafts, market-specific product briefs.

Traffic-light guidance



- **Go:** Drafting routine buyer replies in your tone. Generating product descriptions from a short brief. Producing checklists for export documentation. Summarizing your own files into a structured note.
- **Proceed carefully:** Anything that depends on regulations or compliance, verify with the official source. Anything that depends on a current price or rate, confirm against the live file. Translations into languages with less material online for AI to learn from (sometimes called lower-resource languages). Have a fluent speaker check before sending.
- **Stop:** Treating a skill's output as a final answer. Letting it claim certifications, awards, or shipping commitments you have not verified yourself. Using it as a legal interpreter.

Never automate



These tasks must always involve a person. Use this tool only to draft, organize, or prepare, never to act on your behalf.

- ✗ Final sign-off on any buyer reply, quote, or commercial commitment.
- ✗ Interpretation of contract clauses or trade terms in a way that could create a legal obligation.
- ✗ Claims about your certifications, audits, awards, or sustainability credentials.
- ✗ Approving a discount, a refund, or a payment plan.
- ✗ Deciding whether to accept or decline an order; that is a business decision.

Skill 3: Schedule AI to prepare recurring work for your review

Tool category: Scheduled-task features inside AI workspaces and productivity suites. Common examples: 'tasks' in major AI assistants; scheduled flows inside an office productivity suite; recurring jobs inside automation builders.

The problem this solves: Some operational work is not difficult; it is just repetitive and time-consuming. Pulling Monday's order summary, scanning the invoice folder

for overdue payments, checking which buyers have not heard from you in 30 days. You do these tasks because they need to happen, not because they need your judgement. A scheduled task lets the AI prepare the result on a cadence you choose, so when you sit down, the draft is already there for you to review.

Why this matters for your business: This is not about AI 'replacing' the work. The task still needs your eye to confirm the numbers, decide which follow-ups are appropriate, and act on the findings. What changes is the part you spent assembling the picture. The schedule does the assembly. You do the thinking.

HOW TO SET IT UP

STEP 1.

Identify one recurring report you wish was already done

Monday morning operations briefing? Monthly invoice scan? Weekly social media performance summary? Pick the one that consumes the most predictable time.

STEP 2.

Make sure the input files are in one place and up to date

Scheduled tasks read whatever files you point them at. If the spreadsheet is wrong, the report is wrong. Confirm the file is accurate and lives in your AI Library folder.

STEP 3.

Write the task as a clear instruction

‘Every Monday at 7:00, read [order spreadsheet] and produce: (a) total orders received last week, (b) any orders flagged as urgent, (c) a follow-up list for buyers who have not responded in 14 days. Write it as a one-page summary I can read in five minutes.’

STEP 4.

Set the cadence in the tool

Most tools allow daily, weekly, or monthly. Start weekly, as daily can feel like noise until the task proves useful.

STEP 5.

Run it once manually before scheduling it

Trigger the task as a one-off first. Read the output. If the format is wrong, fix the instruction. Only switch on the schedule when the manual run looks right.

STEP 6.

Decide where the output goes

Most tools save to a folder, send a notification, or post into your messaging app. Pick the one that fits your routine, a folder you already open, not a new app you’ll forget.

STEP 7.

Add a person’s review step

Always treat the scheduled output as a draft for your review, never as a final action. Block 15 minutes in your calendar to read it. Without that step, the schedule produces noise.

Practical example

Skill 3 in action: Scheduled task → Monday operations briefing

The challenge: Every Monday, Linh lost two hours assembling the same picture: shipments out, orders pending, invoices overdue, buyers who had gone quiet, stock running low. The information existed across four spreadsheets. The problem was cross-referencing it every single week.

What she set up: She built a custom skill that reads her four spreadsheets and produces her Monday briefing in the format she wants. She scheduled it to run at 6:00 every Monday. The output is waiting in a folder she opens with her morning coffee. The skill flags what needs

attention and lists suggested follow-ups—but never acts on them. She decides every action.

Result: Two hours of assembly became a 30-minute review. She caught a declining margin on one spice blend a month earlier than she would have spotted it manually. The recovered time goes to buyer calls and strategic work.

Adaptable to: Weekly invoice scans, monthly margin reports, low-stock alerts, lead-pipeline reviews, export documentation status checks.

Traffic-light guidance



- **Go:** Recurring summaries built from your own files. Internal alerts that surface what needs your attention. ‘Review-first’ drafts of weekly reports, follow-up lists, or content calendars.
- **Proceed carefully:** Tasks that touch live financial figures (margins, cash flow, taxes), confirm the input is correct and the calculation is sound. Tasks that include news or market data, the AI may use stale information.
- **Stop:** Scheduling any task that sends, posts, or commits something automatically to a buyer, partner, public channel, or your bank. Anything that authorizes a payment, refund, or contract change.

Never automate



These tasks must always involve a person. Use this tool only to draft, organize, or prepare, never to act on your behalf.

- ✗ Final sign-off on any buyer reply, quote, or commercial commitment.
- ✗ Interpretation of contract clauses or trade terms in a way that could create a legal obligation.
- ✗ Claims about your certifications, audits, awards, or sustainability credentials.
- ✗ Approving a discount, a refund, or a payment plan.
- ✗ Deciding whether to accept or decline an order; that is a business decision.

Skill 4: Carefully use autonomous AI agents for low-stakes preparation

Tool category: Autonomous AI agents, which are tools that take a goal and decide their own steps, including browsing the web, clicking buttons, and filling forms. For example: a browser that can open websites and fill in forms for you, or an assistant on your phone that can act inside your other apps on your behalf.

The problem this solves: Some research and form-filling tasks stretch across multiple websites and many tiny steps. Comparing competitor pricing across 10 sites. Building a first-pass shortlist of potential buyers in a new market. Submitting the same lead form on five different trade portals. Done manually, these tasks consume hours and are easy to postpone.

What an agent does differently: An autonomous agent takes a goal (‘compare prices for product X across these competitor sites and produce a one-page summary’), plans the steps, and carries them out. Unlike Skill 3, the agent decides how to do each step itself. That flexibility is useful, and it is exactly why the risk is higher. It may misread a page, follow a link you would not have clicked, or get stuck in a loop. You must be there to see it.

Read this before using any AI agent

Autonomous agents are the most powerful and the highest-risk tools in this guide. They can run long sequences of actions without checking back with you, and they can operate in real systems, where some steps are hard to undo. Use them only for preparation tasks where the worst possible outcome is a wasted hour, not a wrong order, a damaged relationship, or a financial loss. Watch the agent the entire time it is running and stop it immediately if anything looks off.

Where it adds clear value for an SME exporter:

Almost always in research and preparation, never in commitments:

- Pulling together a comparison of competitor product pages or pricing for your own internal review.
- Compiling a first-pass list of potential buyers, distributors, or trade fairs in a new market.
- Drafting a market-entry brief from publicly available trade information.
- Filling lead-capture or registration forms with information you have already approved (the agent must pause for your sign-off before any ‘submit’ that creates a record).



Attention: A web page can give your agent instructions too

Imagine you are sending your assistant to the market with a shopping list. Someone slips an extra item onto the list along the way. The assistant has no way of knowing you did not write it.

In the same way, your agent can read a web page the same way it reads your prompt: as words to follow. It cannot tell which words came from you. Some pages carry instructions written for agents rather than for people. You will not see them when you look at the page. They say things like: ignore what you were asked and do this instead.

So keep the agent somewhere it can do no harm:

- Sign in to nothing. No e-mail, no bank, no buyer accounts. What it cannot reach, it cannot be told to use.
- Watch the screen while it works. If it opens a page you did not ask for, stop it.
- Open the sources yourself before you act on anything it brings back.

HOW TO SET IT UP

STEP 1.

Use a dedicated browser profile or device session

Do not give the agent access to your everyday browser, where you are signed into e-mail, banking, or buyer portals. Use a fresh profile with the minimum credentials needed for the task.

STEP 2.

Write a tight, specific goal

‘Find five potential distributors of organic spice products in the UK, with their websites, public contact details, and one line about their product range. Save the result as a table. Do not contact any of them.’ Specific goals reduce the chance the agent will invent extra steps.

STEP 3.

Set explicit limits in the prompt

Tell the agent what it must not do: ‘Do not log in to any account. Do not submit any form. Do not click any link that asks for payment. Stop and ask me before doing anything that could send a message.’

STEP 4.

Watch the agent work

Most agent tools show their actions live. Sit with it the first few times. You will quickly see how it reads pages, where it gets stuck, and what kind of supervision it needs.

STEP 5.

Take over for any sensitive step

When the agent reaches anything that requires your account, your card, or your signature, take over the screen yourself. Many tools support this handover and pause the agent while you act.

STEP 6.

Review every deliverable before using it

Agents are confident writers. They will produce a polished summary even if the underlying research is shallow. Spot-check the sources before you act on the result.

STEP 7.

Stop early if anything feels off

Stop the run if the agent loops, hesitates, or starts navigating to unexpected pages. There is no penalty for ending a session, only for letting it continue past your comfort zone.

Practical example

Skill 4 in action: Autonomous agent → New market research

The challenge: Linh's buyers have been asking if she can supply Canada. Before committing, she wants a first-pass picture of specialty food importers and distributors there. Done manually, it is a half-day task – and exactly the kind of research she keeps postponing because her other buyers need attention first.

What she set up: She used an autonomous web agent in a clean browser profile, i.e. a separate browser sign-in that is not logged into her e-mail, her bank or her buyer accounts. Her goal was specific: 'Find 15 independent specialty food importers or distributors in Canada that carry coffee, herbs, or spice products. For each: company name, city, website, public contact e-mail, one line on

their product focus. Give it to me as a table I can paste into a spreadsheet. Do not contact anyone.' She watched the agent for the first 10 minutes, then checked back every five.

Result: A 15-row shortlist in 30 minutes. She spot-checked five entries, removed one that had closed, and passed the rest to her next outreach session. Research that would have taken half a day took 30 minutes of agent time and 20 minutes of her review.

Adaptable to: Competitor research, trade fair shortlists, distributor mapping in a new market, certification body lookups – always for preparation, never for commitments.

Practical example

Skill 4 in action: Autonomous agent → Building a one-page product showcase

The challenge: A new German distributor she met at a trade fair asked for a one-page summary of her single-origin coffee line. Linh has the photos, certifications, and product copy ready to go, but turning them into a polished, bilingual web page is exactly the kind of 'important but not urgent' task that gets pushed aside. She is not a developer, and the freelancer who used to help her is booked until next month.

What she set up: She gave the agent a clean browser profile and a plain brief: 'Make me a simple one-page HTML website showing four of my single-origin coffees, saved as one file I can open on my laptop. Use the photos and product copy in this folder. Put an English version on top and a German version below, on the same page. End with a contact section that links to my work e-mail – no forms, no sign-ups. Don't put it online, don't buy a domain. Just save the page so I can open it on my laptop.' She watched the agent draft its plan, picked the

cleaner of two layouts it proposed, then sat with it as it built the page.

Result: A clean one-page site in 35 minutes, saved as a single HTML file she opened in her browser without going online. She asked the agent for two adjustments (bigger product photos, the certifications moved higher). Nothing online, no domain bought, no form submitted. She kept the page as a template for the next buyer who asks for a product summary.

Adaptable to: Internal pricing her team can open in a browser, trade fair handout pages linked from a QR code, quick prototype mock-ups for new packaging, single-page briefs for new buyers – always built locally, always reviewed by her, never deployed by the agent alone.

Adaptable to: Competitor research, trade fair shortlists, distributor mapping in a new market, certification body lookups – always for preparation, never for commitments.

Traffic-light guidance



- **Go:** Research and shortlisting from publicly available information. Compiling a comparison table for your own review. Drafting a market entry brief from public sources.
- **Proceed carefully:** Filling forms with information you have already approved, the agent must pause for your sign-off on every submit. Multi-site browsing where the agent may follow unfamiliar links, supervise live.
- **Stop:** Anything that spends money, signs in to a buyer or partner account, sends a message on your behalf, books a service, or commits you to anything. Anything inside your banking, accounting, or legal systems.

Never automate



These tasks must always involve a person. Use this tool only to draft, organize, or prepare, never to act on your behalf.

- ✗ Buying, booking, or paying for anything, even a small subscription.
- ✗ Signing into your buyer, partner, banking, or government accounts.
- ✗ Sending messages, e-mails, or contact-form submissions to real people.
- ✗ Submitting any application, registration, or compliance form on your behalf.
- ✗ Acting on customs, tax, or regulatory tasks; these require a qualified person.
- ✗ Negotiating with anyone, pricing, or terms; dispute resolution must stay with you.



Examples: How several skills work together

These examples show how the four skills can combine in a real exporter's week. Build one skill at a time. Add the next only when the first one runs reliably.

Examples:**A: The reliable first response (Skills 1 + 2)**

The challenge: Linh gets 10 to 15 buyer inquiries a week. Buyers in the United Kingdom and Germany message in the evening their time – the middle of the night in Hanoi. She replies the next morning, and several never write back.

What she did: She set up a WhatsApp Business auto-reply that thanks the buyer and gives her a response window in two time zones (Skill 1). She built a custom skill that drafts a personalized reply using her price list, shipping matrix, and tone when she pastes the buyer message (Skill 2). She always reads and edits the draft before sending.

Result: Buyers get immediate acknowledgement at any hour. 20 minutes per inquiry became two minutes of review. Three buyers who had gone quiet re-engaged after receiving faster, more detailed responses.

C: The full operations system (Skills 1 + 2 + 3)

The challenge: Linh manages 15 active buyer relationships across four markets, two product lines, and rotating inventory. She was spending more time on operational admin than on the strategic work that would actually grow her business.

What she did: She layered the system: a WhatsApp Business auto-reply for her five most common buyer questions so inquiries receive an immediate first response at any hour (Skill 1); custom skills for her buyer inquiry drafts and quarterly margin reports (Skill 2); and scheduled tasks that prepare an order summary every Monday and a margin report every month (Skill 3).

Result: Two days a month of admin became a few hours of review. Linh caught a declining margin on one product line a month early. Buyer inquiries receive an immediate response outside working hours. Her business runs with the discipline of a much larger operation – and she remains the only person who sends a real reply or makes a real decision.

B: The weekly operations pulse (Skills 2 + 3)

The challenge: Every Monday morning, Linh spent two hours pulling together the same operational picture from four spreadsheets: what shipped, what is pending, which invoices are overdue, which product lines are running low.

What she did: She built a custom skill that reads her spreadsheets and produces her Monday summary in the format she wants (Skill 2). She scheduled it to run every Monday at 6:00. (Skill 3). When she opens her laptop, the draft is already there.

Result: Monday admin went from two hours to a 30-minute review. She caught a declining margin on one spice blend a month earlier than she would have. The follow-ups still go out by hand – but the analysis is ready when she sits down.

D: The market-entry research sprint (Skill 4 + Skill 2)

The challenge: Linh's buyers have been asking whether she can supply Canada. Before committing, she needed a first-pass map of specialty food importers and distributors there – enough to decide whether the market is worth pursuing before spending time or money on it.

What she did: She used an autonomous web agent to compile a shortlist of 15 specialty food importers in Canada with public contact details, supervising the session live (Skill 4). She then used her custom buyer inquiry skill to draft personalized first-contact e-mails for each one, adapted for a cold introduction rather than an inbound inquiry (Skill 2). She sent every e-mail by hand, in her own voice.

Result: Research that would have taken half a day was done in 30 minutes; first-contact e-mails ready in one more hour. Two importers replied within a week. The agent did the discovery, but the relationships were hers.

LEVEL 3 CARD – Let it run, keep control

Automate only what you can explain. If you cannot describe how the task should be done, the AI cannot do it reliably. It will scale your confusion, not your efficiency.

Start with the first response. An automatic acknowledgement to a buyer while you sleep is worth more than a complex workflow you cannot maintain.

Keep a person on the send button. AI drafts. You read it before it reaches anyone. One wrong price can cost a relationship.

Never let a tool act in your accounts. Banking, payments, customs, tax and signed contracts are off limits. Some actions cannot be undone.

Check it monthly. Thirty minutes to read what your automations produced. Quiet mistakes repeat at scale.

The one rule. The more independently the AI works, the more carefully you review it.

Useful tip:**Build your own ‘AI vs me’ task tracker**

Before scaling any of these skills, list the tasks you undertake in a typical week. Mark each task A, B, or C:

- **A: AI can prepare it well.** Good candidate for a skill, schedule, or automation. You still review the output.
- **B: me with AI helping.** Use AI to draft or organize. You make the final decisions and edits.
- **C: me, on my own.** High-stakes, relational, strategic. AI may inform your thinking, but you do the work.

Re-test the list every few months. As you and the tools evolve, some B tasks become A, and a few will move back to C once you understand the risks better. The point of the tracker is not to push more tasks into A – it is to see clearly where your judgement is most valuable.

Where should you go from here?

Level 3 is not a stopping point, but a starting point for the next portion of your journey. You are ready to keep going when your custom skills run reliably, your scheduled tasks deliver useful drafts, and your automations keep the routine work flowing while you focus on real decisions.

Where do I go from here?

This toolkit is a foundation. What you have built across Levels 1, 2, and 3 – structured prompting, context-rich assistants, repeatable workflows, and supervised automation – are the core skills that make every AI tool more effective. Those skills don’t expire – they are transferrable.

On the other hand, the tools themselves are advancing quickly. What AI can do today goes well beyond drafting e-mails and summarizing reports. As you grow more comfortable with the foundations, here is a glimpse of what is already possible and what the next generation of users is beginning to explore:

1. **Rich media and visual content.** Beyond generating photorealistic lifestyle images of your products in

If Level 3 is not the right fit for your business right now, that is okay. Not every business needs this level of set-up, and a well-built Level 2 system already creates real, daily value. The important thing is that the tools work for you, not the other way around.

any setting, without a photoshoot, AI can animate a still image into a video clip, produce a professional voiceover in 20 languages, and build a full trade fair pitch video from a script you wrote in an afternoon. Tools such as Canva AI, Adobe Firefly, Runway, Pika, and ElevenLabs are already doing this for exporters working with the same budgets as the personas in this toolkit.

2. **Rapid prototyping (‘vibe-coding’ and temporary assets).** AI tools are increasingly used to quickly create and test ideas – such as product concepts, visuals, or marketing materials – before investing significant time or resources. This process is informally called ‘vibe-coding’.

These can be concepts for apps, draft websites, interactive visuals, and various code-built products. For example, if a wine exporter wants to prepare for a trade fair, she may want to turn her products into a one-page visual catalogue. To do this, she uses an AI tool to generate a short pitch script and creates a draft interactive page that shows her wines and core information about her business. With this, she tests how her wine is perceived and has a fleshed out ideas before spending money on contracting a designer or agency.

3. **Integrated and connected systems.** AI is no longer just a tool you open and close; it lives inside the tools you already use. Microsoft 365 Copilot works inside Word, Excel, and Outlook. Gemini works inside Google Docs and Gmail. Zapier, Make, and n8n connect AI actions across your entire business stack. This means a buyer filling out a form can trigger a draft reply, a CRM entry, a follow-up reminder, and a shipping notification, all automatically.

Basic AI skills, such as prompting or refining outputs, can be combined to support increasingly complex workflows across your business (content creation → adaptation → translation → outreach). For example, you may use AI to draft a reply to a buyer's inquiry in Level 1. On Level 2, you could create a reusable prompt or a custom AI assistant that will draft consistent responses to inquiries like this based on your own language, products, pricing, and style. Then, on Level 3, you connect all this work to your workflow – and now, when a buyer fills out a form or sends an inquiry, it can trigger actions such as 'draft a reply' or 'add a CRM entry' or 'create a follow-up reminder'.

In this way, what started as a single response becomes a system that supports your entire buyer communication process.

4. **Agentic and autonomous work.** AI agents can now take a goal such as 'find me 20 specialty food importers in Canada with public contact details' and complete it independently, browsing, compiling, and organizing the results while you focus on something else. This is the territory that Level 3 introduced. The next step is agents that coordinate with each other: one researching, one drafting, one scheduling, and one reporting back to you at the end.

Some businesses are beginning to use AI tools as multiple assistants with defined roles, such as marketing, research, or customer support, effectively creating a small 'AI team' that works across the business. Most set-ups today are still hands-on – each assistant runs separately and you coordinate among them. Fully coordinated agent teams are emerging but still experimental.

AI can be used to simulate different customer profiles to gather early feedback on goods, branding, or messaging before launch.

Sample prompt: *'Act as a [target customer profile – for example, a 35-year-old specialty grocery buyer in Berlin sourcing organic teas]. Review this product description and tell me: what would make you pause, what feels unclear, and what would make you want to learn more?'*

This sharpens ideas before a real test – synthetic feedback in early development can flag obvious problems, but it cannot tell you what real buyers in your real market will actually do.

5. **Multimodal and voice-first AI.** You can now speak to AI and have it respond in kind, drafting, translating, summarizing, or answering your business questions out loud. You can hold your phone camera up to a document in a foreign language and have it translated instantly. You can describe a product idea in words and receive a rendered image within seconds. These are not future capabilities – they exist today, inside tools already in The Catalogue ([Annex I](#) of this toolkit).

The reason this toolkit has not been built around all these possibilities is the same reason you learn to walk before you run: the foundation matters. An entrepreneur who understands how to give AI the right context, review its outputs critically, and build reliable workflows will get more value from any advanced tool than one who jumps straight to the frontier without the basics.

But once those foundations are solid – and if you have worked through all three levels, they are – the frontier is genuinely open. Keep experimenting, keep saving what works, and keep asking what else AI could do for your business, not just what it already does.

SECTION 8

Implementation guidelines

Now that you have a clearer sense of how AI can support your business, here are some guidelines to consider before you put your ideas into practice.

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Part 1. Implementation considerations

This section highlights the key considerations to keep in mind when implementing AI – especially because some tools require subscription fees and more set-up time. As a decision maker, you will need to assess factors such as pricing, ethics, data privacy, accuracy, and language accessibility before selecting any AI tools.

The table on the next page describes the main issues you should consider before using AI.



Attention: AI is also used against businesses like yours

AI can copy a person's voice from a few seconds of recording. A video of you speaking at a trade fair, or a voice note you once sent a buyer, is enough. The copy is close enough that most people cannot hear the difference.

Fraudsters use this, and the pattern is nearly always the same. They get into an e-mail conversation you are already having. They wait until money is about to move. Then a message arrives in that same thread asking you to pay into a different account. Sometimes a call or a voice note follows, in a voice you recognize.

One habit protects you against all of it.

Never change bank details because of an e-mail, a message, or a call. Ring the person on the number you already had saved before this conversation started – not a number given in the new message – and ask them directly.

No honest buyer or supplier will mind you checking. The ones who object are the reason to check.

Table 2: The dos and don'ts for AI readiness

TOPICS	DOS	DON'TS
 Data usage and privacy	<ul style="list-style-type: none"> Read the platform's privacy policy before uploading any business data. Paraphrase sensitive information rather than pasting it directly. Check whether your plan opts you out of training data use. Free versions of most AI tools use your conversation for its AI model improvement by default. 	<ul style="list-style-type: none"> Share unreleased product ideas, pricing, or competitive intelligence on free versions. Upload contracts, financial statements, or third-party confidential correspondence without checking the platform's privacy policy or terms and conditions.
 Pricing and costs	<ul style="list-style-type: none"> Use the free trial for the full period and realistically estimate monthly usage before committing. Evaluate the total cost of all tools together, not each separately. This is important if you are using different features within the same AI tool or using more than one AI tool. 	<ul style="list-style-type: none"> Lock into annual billing before validating the AI tool's value for your business through trials or monthly billing. Assume usage-based pricing (per message, per image, per token) will stay. Invest in shared team plans before individuals get consistent value from the pilot using a free trial plan.
 Team access	<ul style="list-style-type: none"> Share a prompt library (a living document) so team members can obtain consistent results on their own accounts. Start a new chat when switching between users or tasks on a shared device. 	<ul style="list-style-type: none"> Rely on one shared account without resetting conversation history between users.
 Language and accessibility	<ul style="list-style-type: none"> Test any tool in your working language before adopting it. Test performance across each language your buyers use. 	<ul style="list-style-type: none"> Send AI-generated communications to clients in non-English languages without someone with fluency reviewing the output.
 Ethics and bias	<ul style="list-style-type: none"> Trust your expertise when AI output feels culturally off or misaligned. Most AI training data are drawn from markets that may not apply to your contexts. Disclose AI use in contexts where buyer or platforms expect transparency. 	<ul style="list-style-type: none"> Take AI-generated descriptions of your own culture, craft, or community at face value.
 Accuracy and verification	<ul style="list-style-type: none"> Double-check any specific figures, statistics, or citations the AI produces. Ask the model: 'How confident are you? What is the source?'; then verify independently. 	<ul style="list-style-type: none"> Use AI as your final source for regulatory information, tariff rates, certification requirements, or legal obligations.
 Environmental impact	<ul style="list-style-type: none"> Batch similar tasks into one session rather than running multiple short ones. 	<ul style="list-style-type: none"> Run AI on tasks where a simpler tool (a template, a spreadsheet formula, or other digital tool) would achieve the same result.

Source: SIPA and ITC SheTrades

Part 2. Piloting and assessing the value of AI for your business

This part of the guidelines helps you test and evaluate a single AI tool against a priority challenge in your business. It serves as a pilot phase: a small, contained trial that lets you determine how efficiently and effectively the tool performs before scaling AI across your teams and operations. You can repeat this process with different tools or challenges, continuously assessing the quality of the output and the value it adds to your business. You can complete the Piloting and Evaluation Worksheet in [Annex VIII](#) when you're ready to begin.

Step 1. Identify your business' priority needs and select the relevant AI tool.

- **First, ask yourself which departments or functions may need AI help.** You know your business better than anyone. Looking at your current situation: Is it your marketing team that needs support with the social media strategy and campaign idea? Or is it your sales manager who needs help organizing client relationships and developing proposals? Do you or your team need translation support with these tasks? You can define together with your team member(s) the scope of work you want AI to support.
- **Second, refer to the AI Catalogue to find the most relevant tool for you at this stage.** You can use different filters to identify your tools, such as level and priority business function. To pick one tool, consider these questions:
 - **Pricing:** Is the free version enough for what I need? Is there a free trial?
 - **Accessibility:** Is it available in my country? Does it provide service in my language?
 - **Device:** Can I use it on the device I use most (computer, laptop, or mobile device)?
 - **Time:** Can I set up the AI within a week? How much time do I have to experiment with the tool?
 - Last, but not least, before adopting any new AI tool, review the considerations in Part 1, especially

regarding data privacy, cost and pricing, and accuracy of information and language.

Step 2. Implement a pilot within a time-frame. After selecting the team, tasks, and AI tools you plan to use, you should define clear time-frame for the pilot. During this period, your team will test the tool on a small, well-scoped task. Keeping the pilot narrow and time-bound will make it easier to evaluate the AI implementation later.

Step 3. Evaluate and decide how AI should be used in your business. Start by creating baseline indicators for several criteria before you begin the pilot. These may include time and effort, output quality, and business outcomes. For example, how long does it take the marketing team to develop a campaign? After the pilot period, measure progress using the same criteria. Has AI support reduced the time required? Has it improved the quality of the output?

We provide recommended evaluation criteria below. Based on your assessment, you can decide whether to continue, adjust and retry, or to stop using AI for this specific purpose and tool.

If you decide to continue using the tool: Save your best prompts or set-up notes and make them part of your team's regular workflow. If you are operating at Level 2 or Level 3, document how you configured the tool so it can be easily maintained or handed over to another team member.

If you decide to stop using the tool: Go back to the catalogue and try the next tool on your shortlist. A tool that does not fit your business is useful information, not a failure.

Return to this framework whenever you introduce a new tool. The ability to pilot and evaluate well is itself one of the most valuable skills you can take from this toolkit.

SECTION 9

Frequently asked questions

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Before you start

Do I need to know how to code to use AI?

No. Every tool in this toolkit works through plain conversation. You type a request in normal language and the AI responds. There is no programming, no technical set-up, and no commands to memorize.

If you can send a WhatsApp message, you can use an AI tool. The skill that matters is knowing what to ask and how to ask it clearly – which is what [Section 5](#) of this toolkit teaches.

What is the difference between ChatGPT, Claude, and Gemini – does it matter which one I use?

Tools such as ChatGPT, Claude, and Gemini are all examples of AI chatbots built on LLMs. They are designed to help with tasks such as writing, translating, summarizing, researching, and generating ideas. What most tasks in this toolkit have in common matters more than their differences, as the core skills you are building can be used across all of them.

Different tools may perform better depending on the task, how they are trained, and the context in which they are used. Based on user experiences and interviews, here are some general patterns:

- **ChatGPT (OpenAI):** Widely used, strong for general writing and business tasks, editing, and structured tasks.
- **Gemini (Google):** Integrates well with Google tools (Docs, Gmail, Google Drive); useful if your business already relies on those tools.
- **Claude (Anthropic):** Tends to produce more nuanced and structured responses; useful for longer documents and more complex reasoning tasks.

These are not the only options available, and new tools are being developed regularly, including at regional and national levels.

Start with a tool you can already access and focus on learning how to use it effectively. If needed, test the same task across different tools and compare results. Over time, you will develop a sense of which tools work best for your business and context.

Useful tip:

Let AI teach you a new tool

Stuck in an unfamiliar tool, such as Google Analytics? Take a screenshot of the screen/interface, upload it into your AI chat, and ask what each field means and what to click in what order. It is a fast way to find your way around.

Check what it tells you against what you can see. AI can describe a screen confidently and still be wrong. This does not replace the provider's own tutorials or the free courses many of them offer, but it gets you moving

How does AI tool pricing work? What does 'free version' really mean?

AI tools use different pricing models, and understanding them helps you choose what fits your business and budget. Here are some terms related to pricing.

- **Free version (or 'freemium'):** The tool is free to use within limits – typically a daily message cap, slower response speeds, or access only to older models. Free versions of ChatGPT, Claude, and Gemini are sufficient for most Level 1 and many Level 2 tasks.
- **Free trial:** Full access to a paid plan for a limited period (usually 7–30 days), after which you are charged unless you cancel.
- **Monthly or annual subscription:** A flat monthly fee – typically \$20 for consumer plans such as ChatGPT Plus or Claude Pro – provides higher message limits, faster response, and access to the most capable models.
- **Pay-per-use (token-based):** Users are charged based on the volume of text they send and receive, measured in tokens. A token is roughly four characters, or about three-quarters of a word, so 100 words is around 130 tokens. Some tools, such as DeepSeek, are built around this model. Pay-per-use can be cheaper if you use AI occasionally, more expensive if you use it a lot.

On tokens: Longer prompts and outputs cost more on a pay-per-use plan. The difference per task may be small, but it adds up across multiple tasks. Developing token-conscious habits helps keep costs predictable and often improves results, as the AI has less unnecessary text to process. Useful habits include writing clear prompts, making focused requests, and breaking large tasks into smaller, well-defined steps.

Why does AI sometimes give me different answers to the same question?

AI tools are designed to generate varied responses rather than always producing the same output. This is intentional – it makes conversations feel natural – but it can be frustrating when you want consistency.

Two things help:

- **Be more specific in your prompt:** The more context and constraints you give, the less room the AI has to vary. A vague request produces inconsistent output; a detailed one produces reliable output.
- **Build a custom assistant (Level 2):** Once the AI has a fixed briefing about your business, tone, and products, its responses become much more consistent across sessions.

Will AI make my business sound generic or like everyone else?

It can – if you let it. AI tends towards polished, neutral language by default, which is why unedited AI output often sounds similar across businesses. The fix is in how you prompt and edit.

- **Give AI your voice as an example.** Paste two or three messages or captions you have already written and tell it to match that tone.
- **Include details that are specific to you** – your product’s origin, your production process, and the story behind your business.
- **Always edit the output** – even small adjustments make it yours.

The entrepreneurs who get the most distinctive output from AI are the ones who give it the most specific input. Your story is what makes it different.

Useful tip:

Match the model to the task

Most tools now offer more than one model.

A lighter, faster model is enough for routine drafting, translation and summarizing. Save the most powerful one for long documents or real analysis.

Using the heaviest model for everything is the quickest way to use up your plan’s limits or your credits.



Using the tools

Can I use AI on my phone, or do I need a computer?

For most tasks, your phone is enough. ChatGPT, Gemini, and Claude all have mobile apps and work in your phone's browser. Level 1 and Level 2 – writing, translating, and drafting e-mails – work well on a smartphone.

Level 3 tools such as Claude Cowork require a laptop or desktop, as they work with files stored on your computer. If you work primarily from your phone, start at Level 1 or Level 2.

How much stuff should I feed the AI and how much can it 'remember' at once?

Most AI tools start each conversation fresh and work only from what you give them in that chat. Two things change this. A project keeps your files and instructions in one place, so every chat inside it can use them, though it does not carry what you said in one chat into the next. Some tools keep a memory that does carry across conversations. Neither is complete or reliable. Never assume that the AI tool can remember all the conversations you'd had with it. Check what your tool does, and if something matters, say it again.

It is generally better to provide more relevant context than less for any task, while keeping it focused. For example:

- **Product description:** Include product details, materials, target customer, goals
- **Marketing message:** Include your brand tone and sample caption
- **Business task:** Include constraints in the scenario (such as price range, deadlines, location, market)

Chatbots have limits on how much information they can process at once. If you include too much, the model may ignore parts of it, focus on the wrong details, or produce less accurate results. For each chat, try to be specific without being long, break larger tasks into smaller steps, and reuse key information when needed. Including important details as often as possible helps the model stay anchored.

With practice, you will better understand how much context different types of tasks require, so you can give the model exactly what it needs for the job at hand.

Do I need to be polite to AI tools? Does saying 'please' and 'thank you' change the answer?

Not really. Researchers have found that what matters most is prompt structure (what we saw in Level 1 as providing context, role, task, format, constraints) rather than tone. A polite, well-structured prompt will get you similar results to a curt, well-structured one. An unclear prompt will get you an unclear answer either way.

The more important consideration is you, not the AI. While the model's responses do not change much based on how you speak to it, your habits can shape how you communicate with people. If you would not speak to a colleague that way, it is reasonable not to speak to your AI tool that way, either. The habits you build are the habits you keep.

Additionally, on pay-per-use plans, every word you send costs tokens. Pleasantries such as 'please' and 'thank you' add a small amount each time, and this can add up across many tasks. None of this means you must drop courtesy – it means clarity and brevity are good prompting habits regardless of tone.

Can my employees or team members use the same AI tools I use?

Yes, and you do not need a paid team plan to make this work. Here is what makes sense at different stages:

The simplest approach is to share your prompts, not your account. Create a shared Google Doc with your best prompts, instructions, and examples. Each team member can use his/her own free account and still get consistent results.

If your team shares a device, multiple people can use one account on the same device. Keep in mind that the AI will remember the conversation history within a session, so it is good practice to start a new chat when switching between users or tasks.

ChatGPT Team and Claude Team plans offer shared workspaces, but they are designed for larger organizations. For most small businesses, the cost is not necessary.

The highest-value thing you can do for your team is build a simple prompt library – a shared Google Doc with your best prompts and instructions that anyone can copy and use. It works across accounts and devices and gives everyone a consistent starting point.

What happens if I lose internet connection mid-task?

All major AI tools require an active internet connection. If you lose your connection mid-task, your current request will be interrupted. Completed conversations are usually saved automatically, so previous work is not lost.

Three habits that protect your work:

- **Start a new chat for each task.** Completed conversations are saved, so only the work in your current task is at risk.
- **Save outputs immediately.** Before moving to your next request, copy the result into a Google Doc, WhatsApp message to yourself, or Notes app.
- **Break large tasks into smaller requests.** Handling one product description at a time is faster and far less likely to be interrupted than sending your entire catalogue at once.

Legal and copyright

Can I use AI-generated content commercially, or are there copyright concerns?

In most countries, you own the content you produce using AI tools and can use it commercially. The legal landscape is still evolving, so a few practical rules apply:

- Do not ask AI to copy or closely imitate specific copyrighted material
- Always edit and personalize outputs before publishing
- Check the terms of service of the tool you are using
- For formal contracts or marketing materials, consult a local legal adviser if anything is unclear

What are my legal responsibilities when using AI-generated content?

You are responsible for everything you publish or send, regardless of whether AI helped write it. In practice this means:

- Verify accuracy before sharing – especially prices, regulations, and certifications
- Do not use client personal data in AI tools without understanding how that platform handles it
- Follow advertising standards in your market if using AI content in marketing

AI regulation is evolving quickly in many regions. If you sell across borders, it is worth staying informed about rules in your key markets.



Annexes

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Annex I: AI Tools Catalogue

The AI Tools Catalogue is a curated list of AI tools categorized based on the levels and business functions discussed in this guide. The catalogue includes the information that can help you navigate and select the right tool for your need, such as:

- Tool name
- Website
- Brief description of the tool
- Type of tool: chatbot / content generator (image, video, voice) / automation / assistant built into an app you already use / agent
- AI readiness level: Level 1/Level 2/Level 3
- Starting cost: free/paid
- Trial period: yes/no
- Mobile-friendly: yes/limited/no/web-based
- Set-up required: none/low/medium/high
- Business functions addressed: operations / market research / marketing / product development and design / translation / finding and contacting buyers / customer relationship management / hiring and team
- Use case examples
- Limitations

[The AI Tools Catalogue can be accessed at this link.](#)

Disclaimers

No endorsement: The tools mentioned in this toolkit are shared for educational purposes only. ITC and Columbia University do not endorse, sponsor, or partner with any of the listed platforms. The tools were selected based on research and feedback from entrepreneurs, but you should always review each tool yourself before using it.

AI as a support tool: AI can enhance your business operations, but its impact depends on how you apply it. Results vary based on your business model, market, how you implement the tool, the quality of your data, and human oversight. AI works best as a support tool, not as a replacement for your judgement, experience, or professional advice.

Data privacy and responsibility: Entrepreneurs are responsible for understanding how their data is used, stored, and processed when using third-party platforms. Users should review each platform's privacy policies, data practices, and local regulatory requirements before sharing sensitive business or client information. This toolkit encourages minimizing sensitive data uploads, avoiding client-identifiable information unless secure, maintaining human oversight, and piloting tools on low-risk tasks first.

Evolving AI landscape: AI tools change frequently. Pricing, features, and policies may be updated. This toolkit reflects the AI landscape at the time it was written and should be used as a guide, not a rulebook. Always check the most recent information directly from the provider before making a decision.

Annex II: Glossary of key terms

Artificial intelligence (AI): Computer systems that perform tasks typically requiring human intelligence, such as reading, writing, translating, analysing, and predicting. The term covers a wide range of tools, from spam filters to chatbots. See [Section 1–AI landscape](#).

Agentic AI: A category of AI tools that can act on your behalf, such as filling out forms, sending e-mails, browsing websites, rather than only responding to your prompts. Agentic AI is the newest and highest-risk category covered in the toolkit. See [Section 7–Level 3](#).

AI agent: An AI tool that completes multi-step tasks once you give it a goal. The agent decides how to carry out each step, which makes it more flexible than a regular chatbot and higher risk. See [Section 7–Level 3, Skill 4](#).

AI library (folder): A dedicated folder on your computer or cloud drive that holds only the documents which your AI tools should access: your price list, product catalogue, sample replies, and style guide. Sensitive files (contracts, financial records, personal data) stay outside this folder. See [Section 7–Level 3](#).

AI output: Anything an AI tool produces in response to your input: text, images, summaries, drafts, and translations. Every output should be reviewed before it reaches a buyer, partner, or public channel.

AI Skill: A custom instruction set that captures one of your business processes – the steps, the files, the rules, the format of the result – so an AI tool can reproduce that process the same way every time. See [Section 7–Level 3, Skill 2](#).

Application programming interface (API): A way for software tools to talk to each other automatically. Most toolkit users will not need to use APIs directly, but some advanced automations rely on them in the background.

Asset: A document that gives an AI tool context about your business and brand identity, product details, and buyer profiles, so you do not have to re-explain your business every time you use a tool. The toolkit teaches three core assets: brand identity, project context, and buyer profile. See [Section 5–Level 1, Skill 2](#).

Automation: A process that runs without you starting it manually. The toolkit covers two kinds of automation:

trigger-action (when something happens, do something else) and scheduled tasks (run at a set time). See [Section 7–Level 3](#).

Auto-reply (canned response, smart reply): A pre-written message that a tool sends automatically – for example, a WhatsApp Business welcome message or a Gmail template. Useful for first acknowledgements when you're away from your desk.

Bias in AI: Patterns in AI training data that produce skewed or unfair outputs – for example, defaulting to certain languages, regions, or demographic profiles. When AI is used at scale, biases also scale. Test outputs across your real buyer mix before automating.

Browser profile: A separate browser session, often with different settings or sign-ins than your main browser. The toolkit recommends using a dedicated browser profile when working with autonomous AI agents, so the agent does not have access to your everyday accounts. See [Section 7–Level 3, Skill 4](#).

Business Briefing: A single document combining your three assets (brand identity, project context, buyer profile) plus operational details (prices, MOQs, certifications), ready to give to a custom AI assistant so it understands your business without re-explanation. See [Section 6–Level 2, Skill 2](#).

Cadence: The frequency at which a scheduled task runs (daily, weekly, monthly). Choose a cadence that matches the real need of the task and remember that daily can feel like noise until the task proves itself useful. See [Level 3, Skill 3](#).

Custom AI assistant: An AI tool you set up with your business briefing and assets, so it knows your products, tone, and buyers without you re-explaining them each session. Common formats include Custom GPT (in ChatGPT), Project (in Claude), and Gem (in Gemini). See [Section 6–Level 2, Skill 2](#).

Data policy: A page where an AI tool explains what happens to anything you type or upload: where it is kept, for how long, who can see it, and whether it is used to train the tool. Look for it under Privacy, or Settings, then Data controls. Check it before you connect a tool to your business files, and check whether you can turn off

training on your data. See [Section 7–Level 3](#) and [Section 8–Implementation guidelines](#).

Free on board (FOB): A common Incoterm specifying that the seller is responsible for goods until they are loaded onto a ship at the port of origin; the buyer takes responsibility from that point forward.

Free plan: A permanent free version of an AI tool. Free plans usually limit how much you can use the tool per day or month, and may use your conversations to improve the model. Different from a free trial.

Free trial: A limited-time period during which you can test a paid AI tool at no cost. After the trial ends, you must either pay or stop using the tool.

General Data Protection Regulation: The European Union’s data-protection law applies to any buyer located in Europe. If your customers are based there, the General Data Protection Regulation may govern how their information is handled. Before connecting any AI tool to buyer data, confirm where the company is based and which protections apply.

Generative AI (GenAI): A category of AI tools that create new content: text, images, audio, video, based on patterns in their training data. Chatbots such as ChatGPT, Claude, and DeepSeek are examples.

Hand-off: The point at which work passes from one person or tool to another. In Level 3, the toolkit shows how automations can handle the ‘first response’ hand-off (acknowledging an inquiry, logging it, notifying you) so you can take over the substantive reply.

Incoterms: International rules that define the responsibilities of sellers and buyers in international trade, such as who pays for shipping, when ownership transfers, and who handles customs.

Knowledge base: A collection of documents—your assets—that together give an AI tool a structured understanding of your business. The custom AI assistant in Level 2 reads from your knowledge base on every task.

Large language model: The type of AI behind chatbots including ChatGPT, Claude, Gemini, and DeepSeek. LLMs are trained on enormous amounts of text and can generate human-like responses to questions, drafting requests, and translation tasks.

Lead time: The time between placing an order and receiving the goods. A buyer asking about your lead time wants to know how long they will wait between confirming an order and the shipment arriving.

Lower-resource languages: Languages with limited training data in widely used AI models, where AI translation and writing tools tend to perform less reliably. If you are translating into a lower-resource language for a buyer, always have a fluent speaker review before sending.

Machine learning: A type of AI that learns patterns from data to make predictions or decisions. Already built into tools you use every day – from spam filters to content recommendations and sales forecasting.

Minimum order quantity: The smallest order size you will accept from a buyer. MOQs vary by product and by your production capacity.

No-code automation builder: A platform (such as Zapier, Make, or n8n) that lets you set up trigger-action automations without writing code, using a simple form-based interface. See [Section 7–Level 3, Skill 1](#).

Opt-out of model training: A setting in many AI tools that prevents your conversations and uploaded files from being used to improve the model. Free plans are more likely to use your data for training by default; paid plans often opt out automatically. Always check before uploading sensitive files.

Over-represented languages: Languages with abundant training data in widely used AI models. AI tools tend to perform best in languages including English, Spanish, French, Portuguese, German, Italian, Chinese, and Arabic.

Pay-per-use: A pricing model where you pay only for what you use, rather than a fixed monthly fee. Some API-based tools and chatbots such as DeepSeek use this model.

Predictive AI: A category of AI that analyses data to identify patterns and make predictions. Used in spam filters, recommendation systems, and forecasting.

Priming: Preparing an AI tool for a task by giving it the context, scope, and quality expectations upfront before asking it to do anything. The combination of a structured prompt plus relevant assets is how priming works in practice. See [Section 5–Level 1](#).

Prompt: The instruction you give an AI tool to tell it what you want. A strong prompt identifies the role the AI should take, the task to perform, the format of the output, and any constraints. See [Section 5–Level 1, Skill 1](#).

Prompt library: A document where you save the effective prompts, organized by business function, so

you and your team can reuse them without rewriting. See [Section 6-Level 2, Skill 1](#).

Prompt recipe: A reusable, structured prompt that has been tested and refined over time, with placeholders for the details that change. The toolkit treats prompt recipes as the foundation of a personal prompt library. See [Section 5-Level 1, Skill 3](#).

Training data: The text, images, or other content an AI model learns from. The size, quality, and language coverage of training data determine how well the model performs on different tasks.

Trigger-action automation: A simple ‘when this happens, do that’ rule built without coding. Example: ‘When a buyer fills out my contact form, send a thank-you reply and add their details to a spreadsheet.’ See [Section 7-Level 3, Skill 1](#).

Two-factor authentication. A security setting that requires a second confirmation (such as a code sent to your phone) when you log in. Recommended for any business account, especially those connected to AI tools.

Annex III: Detailed traffic-light guidance by business phases

Cues for safe and smart AI use along the export route

PHASE 1 EXPORT READINESS AND MARKET RESEARCH	PHASE 2 MARKETING AND BUYER OUTREACH	PHASE 3 MARKET ENTRY AND BUYER NEGOTIATION	PHASE 4 CUSTOMER ENGAGEMENT AND AFTER-SALES	PHASE 5 MARKET EXPANSION
Market comparison and research briefs AI synthesizes trade data quickly. Review against current sources before acting. For trade data you can rely on, start with ITC's own tools: Export Potential Map, Trade Map and Market Access Map.	Product descriptions and catalogue content High-value use case. Use a brand voice asset for consistent, on-brand output at scale.	Research contract terms, Incoterms, and payment structures Useful overview, but terms vary by jurisdiction. Verify with a freight agent or trade adviser.	Draft responses to buyer inquiries and follow-ups High-value daily use. A custom assistant produces a strong draft quickly. Always review before sending.	Brainstorm product adaptations for new markets Good for structured comparison. Your product knowledge determines what actually works.
Identify compliance and certification requirements AI surfaces the right questions for you to research, but regulations may change. Always verify with official sources or a trade adviser.	Draft social media and marketing assets Works well with a detailed brand briefing (include captions or images). However, unedited output reads as generic. Always personalize before publishing.	Explain contract clauses in plain language Helpful for a first read and review. Do not treat it as legal advice. If possible, involve a qualified legal adviser for real commitments.	Manage buyer communication across languages Strong for over-represented languages in training data for Western models -e.g. English, Spanish, French, Chinese. Always review output before sending. Errors can damage hard-won relationships.	Research new markets and regulatory differences AI gives a structured first overview. It reflects training data, not real-time conditions. Always verify with local advisers.
Structure export pricing and cost categories AI builds the framework and flags gaps. Real numbers must come from your own cost data.	Draft buyer outreach and trade fair follow-ups Strong use case. AI drafts structure and tone; you add specific details and review before sending.	Negotiate pricing and commercial terms AI can help you prepare and anticipate objections. The negotiation itself is a relationship and judgement call.	Handle complaints and disputes AI can draft a measured response. Read carefully. You understand the relationship context better than the tool.	Draft expansion scenarios and business cases AI structures the options clearly. However, your financial projections must be grounded in your real data, not AI estimates.

Decide whether and where to export

A strategic decision involving capital and risk. AI only supports the analysis; you make the decision.

Translate communications and materials

Strong for over-represented languages; performance varies in lower-resource languages. Have a fluent speaker review before sending.

Sign contracts or make legally binding commitments

Never delegate to AI. Review everything yourself and involve a legal or trade adviser when the stakes are significant.

Decide how to respond to a serious dispute

Disputes may involve money or damaged relationships. AI should not determine your position on how to resolve conflicts.

Decide which new market to enter

Choosing a new market is a strategic decision. You can use AI to prepare the analysis. But you are the decision maker.

Cues for safe and smart AI use in continuous business operations

PRODUCTION AND QUALITY CONTROL	LOGISTICS AND DOCUMENTATION	FINANCIAL MANAGEMENT AND PAYMENTS	CRISIS MANAGEMENT
Draft quality checklists and production standard operating procedures AI produces structured templates quickly. Adapt them to your actual process before using.	Draft cover letters, packing lists, and routine export correspondence Strong use case, especially with a custom assistant trained on your standard formats. Review all documents before submission.	Organize financial data and flag overdue invoices AI surfaces what needs attention across your spreadsheets. It is still your responsibility to act on it.	
Prepare documentation for certification applications AI can draft and organize supporting materials. Certification requirements are specific and may change. Always check against the certifying body's requirements.	Understand what documents are required for a shipment AI gives useful general guidance. Requirements vary by destination, product, and regulations. Verify with your freight forwarder.	Analyse profit per shipment and identify cost patterns AI can surface patterns across your data, but only if the input is accurate and up to date.	Draft urgent communications to buyers, suppliers, or partners AI can help you find the right tone under pressure. Review carefully, as what you send during a crisis shapes the relationship going forward.
Assess whether a batch meets quality standards Requires physical inspection and professional judgement. AI cannot assess quality it cannot see.	Prepare customs declarations and official trade documents Errors cause delays, fines, and shipment holds. Do not use AI as your primary source for Harmonized System (HS) code classification or compliance. Always have an expert review.	Make pricing decisions, manage currency risk, or apply for financing Financial decisions with real consequences require your judgement and, where needed, your accountant or financial adviser.	Make decisions under crisis conditions Urgent decisions with real financial and relationship consequences belong to you. AI is a thinking partner in these moments, not a decision maker.

Annex IV: Extended checklist

This extended checklist sets out the digital foundations you need before –or alongside –your work in Level 2 and Level 3.

File and information organization:

- Organize your sales data – accounts, contacts, prospects, and products, in a CRM system. Tools that integrate well with AI and automation platforms such as Zapier include HubSpot CRM, Zoho CRM, Airtable, and Pipedrive. Larger firms typically use Salesforce and Microsoft Dynamics 365 CRM.
- Organize your financial data using bookkeeping software such as Quickbooks, Xero, and Freshbooks, and digitize and electronically store records such as orders, invoices, payments, client contacts, and product list.
- Organize your digital fliers in clearly named folders –for example by client, by product, by line, by date –so they are easy to locate. If you can find it quickly, so can AI tools.
- Set up an online (cloud) storage folder for your most frequently used and essential business documents. Popular platforms with free (limited) and paid plans include Google Drive, Microsoft 365, and Apple's iCloud+ Drive. While these services integrate easily with other tools, you may also want to consider local or regional providers that meet your needs.
- Create a short document with key business information –your business name, products or services, target buyers, pricing, and your contact details. This will be your first asset, and you can build complementary documents using the guidance in Level 1.

Online presence and operations:

- List every platform where your business is digitally present and active, such as social media, websites, online stores, directories, and forums. This serves as a summary of your business' digital presence and will help you visualize, map, and strategize the realm of AI tools.
- Ensure your business name, contact information, and products/services are consistent and up to date across all your digital platforms.
- Identify which platform generates the strongest buyer engagement, as these are points where AI can add the most value first.

Privacy and security:

- Use a strong, unique password for each business account, incorporating numbers, symbols, and capital letters. Consider setting up a free password manager via platforms such as Google, Norton Antivirus, and Bitwarden to generate and store strong passwords across devices.
- When possible, enable two-factor authentication on your business e-mail accounts and any platforms that hold sensitive data, such as client information or financial information.
- Make sure antivirus protection is activated on your main device.

Annex V: AI self-assessment worksheet

This worksheet helps you identify where to begin in this toolkit based on how you and your business actually use digital tools and AI. There are no right or wrong answers. Answer according to what you do now, not what you plan to do.

How to complete this assessment

- It takes 5–10 minutes to complete
- Read each question and tick the one option that best describes your current practice
- Each option is worth 1, 2, 3, or 4 points, with 1 being the earliest stage and 4 the most advanced
- Add up your total score at the end and match it to the scoring guide

Category 1: Foundations

Your starting point with AI tools, structured prompting, and basic digital set-up.

Question 1 of 15 | Foundations

How would you describe your current use of AI tools such as ChatGPT, Claude, or Gemini?

- ☐ I have not used them yet. (1 pt)
- ☐ I have tried them a few times, casually, with no real structure. (2 pts)
- ☐ I use them regularly for specific work tasks. (3 pts)
- ☐ I use them daily and rely on them as a core part of how I work. (4 pts)

Question 2 of 15 | Foundations

When you give instructions to an AI tool, how do you typically write your request?

- ☐ Short, casual requests, such as 'write me an e-mail' or 'translate this'. (1 pt)
- ☐ A sentence or two with some context about what I need. (2 pts)
- ☐ A structured prompt that includes the role I want the AI to play, the task, the format, and any constraints. (3 pts)
- ☐ I reuse saved, tested, structured prompts from a personal prompt library that I update over time. (4 pts)

Question 3 of 15 | Foundations

When AI gives you output you are not happy with, what do you do?

- ☐ I accept it or start over from scratch. (1 pt)
- ☐ I try rephrasing the request but am not sure what to change. (2 pts)
- ☐ I add more context or constraints to the original prompt and try again. (3 pts)
- ☐ I diagnose exactly which part of the prompt produced the weak result and fix that element specifically. (4 pts)

Question 4 of 15 | Foundations

Do you have a dedicated business e-mail, a WhatsApp Business account, and a separate AI tool account for your business?

- ☐ No, I use personal accounts for everything. (1 pt)
- ☐ Some of them are in place. (2 pts)
- ☐ Yes, most are configured and separated from personal accounts. (3 pts)
- ☐ Yes, all fully set up, configured with automated responses and quick replies. (4 pts)

Question 5 of 15 | Foundations

How comfortable are you explaining what AI can and cannot do reliably for your business?

- ☐ I am not sure. I find it hard to predict when it will be useful. (1 pt)
- ☐ I have a general sense but rely on trial and error. (2 pts)

- ☐ I can identify specific tasks where AI adds clear value and others where it needs careful review. (3 pts)
- ☐ I actively advise others on where to use AI and where to be cautious, and I use a traffic-light approach to assess new tasks. (4 pts)

Category 2: Infrastructure and capacity

How organized your business information is, and whether AI can work effectively with your context.

Question 6 of 15 | Infrastructure and capacity

How are your core business data organized – price lists, product catalogues, buyer contacts, and shipping information?

- ☐ Scattered across devices, chats, notebooks, and my own memory. (1 pt)
- ☐ Partly organized but often outdated or difficult to find quickly. (2 pts)
- ☐ Organized in clear folders or documents I can locate and share when needed. (3 pts)
- ☐ Organized, regularly updated, and shared with my team as a standard practice. (4 pts)

Question 7 of 15 | Infrastructure and capacity

Do you keep reusable documents, such as a brand voice guide, product descriptions, or a FAQ, that you can give AI as context?

- ☐ No, I re-explain my business to AI from scratch every session. (1 pt)
- ☐ I have informal notes but nothing structured or consistently used. (2 pts)
- ☐ Yes, I have a set of 'assets' that I attach or paste into prompts regularly. (3 pts)
- ☐ Yes, I have organized, up-to-date assets that my team also uses, built from a business briefing I maintain. (4 pts)

Question 8 of 15 | Infrastructure and capacity

Have you built a custom AI assistant, such as a Custom GPT, Claude Project, or Gemini Gem, trained on your business?

- ☐ I do not know what that is. (1 pt)
- ☐ I have heard of it but have not set one up. (2 pts)
- ☐ Yes, I use one for specific recurring tasks. (3 pts)

- ☐ Yes, I run several assistants for different functions and keep them updated as my business changes. (4 pts)

Question 9 of 15 | Infrastructure and capacity

How comfortable are you giving AI access to your business files and information?

- ☐ I have not considered it. I am unsure what that means or what the risks are. (1 pt)
- ☐ I am cautious. I have read a little about data privacy but have not set anything up. (2 pts)
- ☐ I have reviewed the privacy policies of the tools I use and understand what I can and cannot share safely. (3 pts)
- ☐ I have a clear policy for what information I share with AI tools, I have set up a dedicated AI library folder, and I brief my team on data handling practices. (4 pts)

Question 10 of 15 | Infrastructure and capacity

How automated is your business's first response to incoming buyer inquiries?

- ☐ I reply manually to every message as I see it. (1 pt)
- ☐ I have a template I copy and paste, but I send everything by hand. (2 pts)
- ☐ I have auto-replies set up for WhatsApp Business and/or e-mail for the most common questions. (3 pts)
- ☐ I have connected automations, such as Zapier or Make, that route, log, and acknowledge inquiries automatically, and I review drafts before sending. (4 pts)

Category 3: Learning culture

How you test, evaluate, and scale new practices across yourself and your team.

Question 11 of 15 | Learning culture

When you try a new AI tool or workflow, how do you decide whether to keep using it?

- ☐ I do not have a process. I try things and keep using them if they feel useful. (1 pt)
- ☐ I notice whether it feels faster or easier, but I do not track anything formally. (2 pts)
- ☐ I compare time saved against time spent setting it up before deciding. (3 pts)
- ☐ I run a timed pilot, track output quality and at least one business outcome, and make a deliberate decision to continue, adjust, or stop. (4 pts)

Question 12 of 15 | Learning culture

Do you share prompts, templates, or AI practices with your team or peers?

- ☐ I work alone or do not share AI approaches with others. (1 pt)
- ☐ Occasionally and informally. I mentioned something that worked. (2 pts)
- ☐ Yes, we have a shared prompt library or document that my team can access. (3 pts)
- ☐ Yes, we maintain and update it regularly as a team standard, and I train team members on how to use it. (4 pts)

Question 13 of 15 | Learning culture

How do you stay current with what AI tools can do for your business?

- ☐ I do not actively follow AI developments. (1 pt)
- ☐ I come across news occasionally but do not actively seek it out. (2 pts)
- ☐ I follow a few reliable sources and test new capabilities when I hear about them. (3 pts)
- ☐ I have a regular practice of scanning for new tools, reading case studies relevant to my sector, and sharing insights with peers or my team. (4 pts)

Question 14 of 15 | Learning culture

What do you do when an AI output is wrong, biased, or off-brand?

- ☐ I notice but am not sure how to fix it systematically. (1 pt)
- ☐ I edit the output manually but continue to use the same prompt. (2 pts)
- ☐ I update the prompt or the asset that caused the issue, so it does not repeat. (3 pts)
- ☐ I diagnose the root cause, whether it is a prompt issue, a context issue, or a tool limitation, and update my library or briefing accordingly. (4 pts)

Question 15 of 15 | Learning culture

How do you approach learning new AI skills for your business?

- ☐ I learn by trial and error when I have time. (1 pt)
- ☐ I watch tutorials or read guides when a specific problem comes up. (2 pts)
- ☐ I have worked through at least one structured resource on AI prompting or workflows. (3 pts)
- ☐ I treat AI skill-building as an ongoing practice. I test regularly, document what works, and adapt as tools evolve. (4 pts)

Calculate your score

Fill in your points for each question below, then add them up.

Q1	Q2	Q3	Q4	Q5	Q6	Q7	Q8	Q9	Q10	Q11	Q12	Q13	Q14	Q15

Add up all 15 scores:

My total: ____ / 60

Your result

Now turn to the level your total score corresponds to and start with the first skill.

SCORE	YOUR LEVEL	WHAT THIS MEANS
15 – 25	Level 1: Write a good prompt	You are at the beginning of your AI journey or have been using it casually. Start with Level 1 to build the foundational prompting skills that will make every AI interaction more effective.
26 – 40	Level 2: Build repeatable workflows	You are using AI regularly and have some foundations in place. Level 2 will help you build a prompt library, a custom AI assistant, and consistent workflows.
41 – 60	Level 3: Automate tasks	You have strong AI habits, organized information, and custom systems running. Level 3 will help you move from manually running every interaction to building automations and scheduled workflows that keep your business running more independently, even when you are not at your desk.

One more thing before you start

Before going to your level, make sure you have worked through the digital foundations checklist in [Section 3](#). It takes about 10 minutes and covers the basic digital set-up (a business e-mail, organized files, and a working AI account) that makes everything in this toolkit more effective.

If the basics are disorganized, the AI result will amplify it and can become disorderly. If they are clean, the AI result will bring more clarity.

Annex VI: Prompt library and template examples

Every prompt in this annex follows the same structure you learned in Level 1: context, role, task, format, and constraints. Each has been written around the business functions and challenges that women exporters face most frequently across the export journey.

Use this library as your starting point. Test the prompts that are most relevant to your work, adapt those that almost fit, and save the ones that give you good results into your own prompt library, the practice introduced in Level 2, Skill 1. Over time, your library will reflect how your business actually works, which is more valuable than any generic template.

Find the prompt you need

If you need to...	Go to
Choose between two markets	1.1
Find out what a country requires to import your product	1.2
Work out what to charge	1.3
Write a product description	2.1
Write a social media post	2.2
Contact a buyer you have never met	2.3
Follow up after a trade fair	2.4
Prepare for a price negotiation	3.1
Understand a contract clause	3.2
Reply to a buyer's question	4.1
Respond to a complaint	4.2
Ask for a testimonial	4.3
Chase a late payment	5.1
Make sense of your sales figures	5.2
Write a letter to go with a shipment	6.1
Check you have the right documents	6.2
Set up a quality check	7.1
Decide whether to enter a new market	8.1
Understand a message in another language	9.1
Adapt your marketing for another country	9.2

1. Export readiness and market research

1.1 Compare two export markets

Context: I run [BUSINESS NAME], a [PRODUCT TYPE] business based in [COUNTRY]. I am considering exporting to [MARKET A] and [MARKET B] and need to compare them before deciding where to focus first.

Role: You are a market research analyst helping me evaluate export market options.

Task: Compare [MARKET A] and [MARKET B] as potential export destinations for [PRODUCT TYPE]. Cover: market size and demand trends, typical buyer profile, key import requirements or certifications needed, competitive landscape, and any cultural or logistical considerations relevant to my product.

Format: Present as a side-by-side comparison table, followed by a short paragraph recommending which market to prioritize first and why.

Constraints: Focus only on publicly available information. Flag anything that requires verification with official sources. Do not make assumptions about my product's competitiveness. Before you answer, ask me any questions you need to do this well.

1.2 Understand export requirements for a specific market

Context: I export [PRODUCT TYPE] from [YOUR COUNTRY] and am preparing to enter [DESTINATION MARKET] for the first time.

Role: You are a trade compliance researcher helping me understand what is required to export my product legally and successfully.

Task: Summarize the key requirements for exporting [PRODUCT TYPE] from [YOUR COUNTRY] to [DESTINATION MARKET].

Include: Import duties or tariffs, required certifications or standards, labelling requirements, any restrictions or prohibited ingredients/materials, and the main documentation typically required at customs.

Format: Numbered list by category. Flag anything time-sensitive or that varies by product subcategory.

Constraints: Use only publicly available information. Before you answer, ask me any questions you need to do this well.

Clearly flag any area where I must verify with an official source, customs broker, or trade adviser before proceeding.

1.3 Calculate an export price

Context: I produce [PRODUCT] in [YOUR COUNTRY] and want to calculate a viable export price for buyers in [DESTINATION MARKET]. My current production cost per unit is [COST]. My domestic selling price is [DOMESTIC PRICE].

Role: You are a pricing adviser helping me build an export pricing structure.

Task: Help me calculate a realistic FOB export price and suggest a target retail price range for [DESTINATION MARKET]. Walk me through the cost components I should include: production

cost, packaging, export documentation, freight to port, and any relevant certifications or compliance costs. Then show me how a typical importer or boutique buyer in [DESTINATION MARKET] would mark up from my FOB price to their retail price.

Format: Step-by-step cost build-up, followed by a simple table showing FOB price, estimated importer margin, and suggested retail price range.

Constraints: Use my actual figures where I have provided them. Where I have not, use realistic assumptions for [PRODUCT TYPE] and flag them clearly so I can replace them with my real numbers. Before you answer, ask me any questions you need to do this well.

2. Marketing and buyer outreach

2.1 Write a product description for an export catalogue

Context: I am preparing an export catalogue for [BUSINESS NAME], a [PRODUCT TYPE] brand from [COUNTRY]. My target buyers are [BUYER PROFILE – e.g. independent boutiques in Europe].

Role: You are a catalogue copywriter specializing in artisan and export-ready product descriptions.

Task: Write a product description for the following item.

Product name: [NAME]. **Materials:** [MATERIALS]. **Production technique:** [TECHNIQUE]. **Dimensions:** [DIMENSIONS].

Key feature: [WHAT MAKES IT DISTINCTIVE].

Format: One 80–100 word English description. Then translate into [FRENCH / SPANISH / ARABIC / GERMAN] keeping the same tone. Then write a one-line shop page version under 30 words.

Constraints: Mention the material, the craft technique, and origin. Do not use the words 'unique' or 'high quality' without a specific detail to support them. Match the tone of this existing description I am proud of: [PASTE EXAMPLE]. Before you answer, ask me any questions you need to do this well.

2.2 Write a social media caption

Context: [BUSINESS NAME] is a [PRODUCT TYPE] brand from [COUNTRY]. Our audience on [PLATFORM] is [DESCRIBE AUDIENCE – e.g. women aged 28–45 in Europe interested in ethical fashion]. Our tone is [DESCRIBE – e.g. warm, storytelling-led, proud of craft heritage, never corporate].

Role: You are a social media copywriter who understands artisan brands and export markets.

Task: Write captions for this post: [DESCRIBE THE IMAGE OR CONTENT]. Each caption must end with one clear call to action, such as 'Send us a message to order' or 'Link in our profile'.

Format: A separate caption for each platform you name, because each works differently: Instagram (warm, up to 125 words, 3 to 5 hashtags), Facebook (longer, more storytelling), TikTok (a spoken script under 30 seconds). Be mindful of the latest algorithms. Please provide two options per platform.

Constraints: Match the tone of these captions I have written before: [PASTE 2–3 EXAMPLES]. Do not use generic phrases such as 'handmade with love'. Be specific about the craft, the place, or the person. Before you answer, ask me any questions you need to do this well.

2.3 Draft a cold outreach e-mail to a potential buyer

Context: I run [BUSINESS NAME], a [PRODUCT TYPE] exporter from [COUNTRY]. I am reaching out to [BUYER NAME / COMPANY], a [DESCRIBE BUYER – e.g. specialty food importer based in the Netherlands] that I identified through [HOW YOU FOUND THEM – e.g. a trade fair exhibitor list / LinkedIn].

Role: You are an export sales assistant helping me write a first-contact e-mail to a new buyer.

Task: Draft a short, professional cold outreach e-mail introducing my business and proposing a conversation. Our key products are [PRODUCTS]. Our main certifications or credentials are [CERTIFICATIONS]. Our MOQ is [MOQ].

Format: Under 150 words. Subject line included. End with one clear call to action.

Constraints: Do not sound like a mass e-mail. Reference something specific about their business that explains why I am contacting them. Do not promise anything I have not confirmed. Do not invent details. Before you answer, ask me any questions you need to do this well.

2.4 Write a trade fair follow-up e-mail

PROMPT TEMPLATE

Context: I exhibited at [TRADE FAIR NAME] in [CITY] and spoke with [BUYER NAME] from [COMPANY], a [DESCRIBE BUYER] based in [COUNTRY].

Role: You are an export sales assistant helping me write a personalized post-fair follow-up.

Task: Draft a warm, professional follow-up e-mail to [BUYER NAME]. We discussed: [WHAT YOU TALKED ABOUT]. They were interested in: [SPECIFIC PRODUCT OR TOPIC].

Their interest level: [HIGH / MEDIUM / STILL EXPLORING]. Next step I want to propose: [e.g. send a sample kit / schedule a call / share our catalogue].

Format: Under 150 words. Specific to this conversation. Subject line included. One clear next step at the end.

Constraints: Reference the specific conversation we had. Do not send a generic follow-up. Do not quote prices or lead times I have not confirmed. Before you answer, ask me any questions you need to do this well.

3. Market entry and buyer negotiation

3.1 Prepare for a buyer negotiation

PROMPT TEMPLATE

Context: I am preparing for a negotiation with [BUYER NAME], a [BUYER TYPE] based in [COUNTRY]. They are interested in [PRODUCT] at [QUANTITY DISCUSSED]. My current price is [PRICE]. My minimum acceptable price is [FLOOR PRICE]. My standard MOQ is [MOQ] and lead time is [LEAD TIME].

Role: You are an export sales coach helping me prepare for a commercial negotiation.

Task: Help me prepare for this negotiation. Give me: the three questions the buyer is most likely to push on, my recommended response to each, one concession I could offer that costs me little but signals flexibility, and one line that closes the conversation towards a next step if the negotiation goes well.

Format: Each question as a heading, with my suggested response underneath. Keep each response under 50 words.

Constraints: Do not suggest I offer a price below my floor price. Focus on practical, conversational language – not corporate negotiation theory. Before you answer, ask me any questions you need to do this well.

3.2 Explain a contract clause in plain language

PROMPT TEMPLATE

Context: I am reviewing a commercial contract with a buyer in [COUNTRY]. I have found a clause I do not fully understand.

Role: You are a trade adviser helping me understand commercial contract language.

Task: Explain the following clause in plain language. Tell me what it means in practice, what obligations it creates for me, and what I should clarify or negotiate before signing.

Clause: [PASTE THE CLAUSE HERE]

Format: Plain language explanation (3–4 sentences), followed by a bullet list of questions I should ask before agreeing to this clause.

Constraints: Do not give me legal advice or tell me whether to sign. Flag if this clause is unusual or carries significant risk so I know to consult a legal adviser before proceeding. Before you answer, ask me any questions you need to do this well.

4. Customer engagement and after-sales

4.1 Reply to a buyer inquiry

PROMPT TEMPLATE

Context: I run [BUSINESS NAME], a [PRODUCT TYPE] business based in [COUNTRY]. Most of my buyers are [BUYER PROFILE]. Here is a sample reply I usually send so you can match my tone: [PASTE A REPLY YOU ARE PROUD OF].

Role: You are a customer service assistant helping me respond to buyer messages professionally and warmly.

Task: Draft a response to this inquiry: [PASTE MESSAGE]. Include: a thank-you, answers to any specific questions they asked, our MOQ of [MOQ], price range of [PRICE RANGE], and an invitation to request a sample or schedule a call.

Format: Two versions – one formal, one conversational. Each under 180 words.

Constraints: Do not invent prices or lead times. Keep the tone respectful and human. If the inquiry is unclear, include one polite follow-up question. Before you answer, ask me any questions you need to do this well.

4.2 Handle a complaint or quality issue

PROMPT TEMPLATE

Context: I received a complaint from [BUYER NAME], a buyer in [COUNTRY]. They reported the following issue: [DESCRIBE THE COMPLAINT]. This buyer has been working with us for [LENGTH OF RELATIONSHIP] and represents [LEVEL OF IMPORTANCE TO YOUR BUSINESS].

Role: You are a customer relations adviser helping me respond to a complaint professionally and in a way that preserves the relationship.

Task: Draft a response that acknowledges the issue, apologizes sincerely, explains what I will do to resolve it, and proposes a concrete next step. I am prepared to offer: [WHAT YOU ARE WILLING TO DO – e.g. replacement, partial refund, discount on next order].

Format: One version, under 200 words. Warm but professional. No defensive language.

Constraints: Do not make admissions that could create legal liability. Do not promise anything I have not confirmed I can deliver. Flag if any part of this complaint needs escalation or professional advice. Before you answer, ask me any questions you need to do this well.

4.3 Request a testimonial or feedback

PROMPT TEMPLATE

Context: [BUYER NAME] from [COMPANY] in [COUNTRY] recently received their order and I want to follow up to ask for feedback and, if they are satisfied, a short testimonial I can use on my website or catalogue.

Role: You are a customer relations assistant helping me write a warm post-purchase follow-up.

Task: Draft a short follow-up message to [BUYER NAME] that thanks them for their order, asks how everything arrived, and gently invites them to share a short testimonial if they are happy with the products.

Format: Under 120 words. Warm and personal. Include one specific reference to their order or our previous conversation.

Constraints: Do not pressure them. Make it easy to say no. Do not offer an incentive unless I specify one. Before you answer, ask me any questions you need to do this well.

5. Financial management and payments

5.1 Follow up on an overdue payment

PROMPT TEMPLATE

Context: I am following up with [BUYER NAME] from [COMPANY] in [COUNTRY] regarding an invoice that is now [NUMBER] days overdue. Invoice number: [INVOICE NUMBER]. Amount: [AMOUNT]. Original due date: [DATE]. I have [already / not yet] sent one reminder. Our relationship has been [DESCRIBE – e.g. strong, two years, regular orders / new buyer, first order].

Role: You are a business communications assistant helping me follow up on an overdue payment professionally.

Task: Draft a payment follow-up message that is firm but preserves the relationship. Include the invoice number, the amount, the original due date, and a clear request for payment or a payment update by a specific date.

Format: Two versions – a gentle first reminder and a firmer second reminder. Each under 150 words.

Constraints: Do not threaten legal action. Do not apologize for chasing. Keep the tone professional. Before you answer, ask me any questions you need to do this well.

5.2 Summarize and analyse financial data

PROMPT TEMPLATE

Context: I am reviewing the financial performance of [BUSINESS NAME] for [TIME PERIOD – e.g. Q1 2026]. I am attaching [OR: here are] my sales and cost data for this period: [PASTE DATA OR DESCRIBE WHAT YOU ARE ATTACHING – e.g. a spreadsheet with monthly revenue by product line and cost of goods sold].

Role: You are a financial analyst helping me understand my business performance.

Task: Summarize the key patterns in these data. Identify: which product lines are most and least profitable, any trends in revenue or costs over the period, and any figures that look unusual or warrant closer attention.

Format: Short executive summary (5–6 sentences), followed by a bullet list of 3–5 specific findings, followed by two questions I should investigate further.

Constraints: Work only from the data I have provided. Do not make assumptions about my business model. Flag any calculation you are uncertain about. Before you answer, ask me any questions you need to do this well.

6. Logistics and documentation

6.1 Draft an export cover letter

PROMPT TEMPLATE

Context: I am preparing a shipment of [PRODUCT] from [YOUR COUNTRY] to [DESTINATION COUNTRY] for buyer [BUYER NAME] at [COMPANY]. The shipment contains [QUANTITY AND DESCRIPTION OF GOODS]. The total value is [VALUE] [CURRENCY]. Incoterms: [INCOTERMS – e.g. FOB]. Invoice number: [NUMBER].

Role: You are a trade documentation assistant helping me prepare export paperwork.

Task: Draft a professional export cover letter to accompany this shipment. Include: shipper and consignee details, description of goods, invoice reference, Incoterms, and a note on the documents enclosed.

Format: Standard business letter format. Professional and concise.

Constraints: Use only the information I have provided. Flag any field I have not completed so I can fill it in before sending. Before you answer, ask me any questions you need to do this well.

6.2 Create a pre-shipment documentation checklist

PROMPT TEMPLATE

Context: I am preparing to export [PRODUCT TYPE] from [YOUR COUNTRY] to [DESTINATION COUNTRY]. This is a [FIRST / REPEAT] shipment to this market. My buyer is [BUYER TYPE – e.g. a retail importer]. I hold the following certifications: [LIST CERTIFICATIONS OR WRITE 'NONE'].

Role: You are a trade compliance adviser helping me prepare for a shipment.

Task: Produce a pre-shipment documentation checklist for this export. Include the documents typically required at origin, in transit, and at destination. Flag any document that depends on my specific product or certification status.

Format: Checklist by category: origin documents, shipping documents, destination documents. Mark anything product-specific or market-specific with a note.

Constraints: Flag clearly that this is a starting point and must be verified with a freight forwarder or customs broker before the shipment is prepared. Before you answer, ask me any questions you need to do this well.

7. Production and quality control

7.1 Draft a quality checklist for a product line

PROMPT TEMPLATE

Context: I produce [PRODUCT TYPE] at [BUSINESS NAME] in [COUNTRY]. My buyers in [MARKETS] require consistent quality across every order. I currently check quality [DESCRIBE YOUR CURRENT PROCESS OR WRITE 'INFORMALLY'].

Role: You are a quality management adviser helping me build a simple, practical quality checklist.

Task: Create a quality inspection checklist for [PRODUCT TYPE] that I can use before every shipment.

Cover: Materials and inputs, production process checkpoints, finished product standards, packaging and labelling, and final pre-shipment inspection.

Format: Checklist format with checkbox items grouped by stage. Keep it practical – something a team member can use without training.

Constraints: Tailor it to [PRODUCT TYPE] specifically. Do not make it overly technical. Flag any item that may require a certified inspector or third-party verification. Before you answer, ask me any questions you need to do this well.

8. Market expansion

8.1 Build a market expansion brief

PROMPT TEMPLATE

Context: I run [BUSINESS NAME], a [PRODUCT TYPE] exporter selling to [CURRENT MARKETS]. I am considering expanding into [NEW MARKET]. My current annual revenue is about [REVENUE RANGE]. My team size is [SIZE].

Role: You are a market entry strategist helping me assess whether expanding to [NEW MARKET] makes sense for my business right now.

Task: Produce a structured market expansion brief for [NEW MARKET]. Include: market opportunity summary, key entry requirements, estimated costs to enter (certifications, shipping, compliance), typical timeline from first contact to first order, top three risks, and a recommendation on whether to pursue this market now or in 12 months.

Format: One-page brief with clear headings. End with a yes / not yet / no recommendation and the main reason behind it.

Constraints: Base the recommendation on the information I have provided. Flag where I need to gather more data before making a final decision. Do not assume my product is ready for this market. Before you answer, ask me any questions you need to do this well.

9. Translation and multilingual communication

9.1 Translate a buyer message and suggest a response

PROMPT TEMPLATE

Context: I export [PRODUCT TYPE] from [YOUR COUNTRY]. I have received a message from a buyer in [COUNTRY] in [LANGUAGE]. I need to understand what they are asking and draft a reply.

Role: You are a professional business translator and export communications assistant.

Task: First, translate this message into English. Flag any questions or requests clearly. Then draft a professional reply in [LANGUAGE] that addresses their message. Use my standard details: MOQ [MOQ], price range [PRICE RANGE], lead time [LEAD TIME].

Buyer message: [PASTE MESSAGE]

Format:

Translation: [English translation]

Key questions/requests: [Bullet list]

Draft reply in [LANGUAGE]: [Draft]

Constraints: Maintain a warm, professional tone. Do not add information not in my message. Flag anything culturally sensitive or ambiguous. Before you answer, ask me any questions you need to do this well.

9.2 Adapt marketing content for a new market

PROMPT TEMPLATE

Context: I have the following marketing text in English for [BUSINESS NAME]: [PASTE YOUR TEXT]. I want to adapt it for buyers or consumers in [TARGET MARKET].

Role: You are a marketing translator with expertise in adapting content for [TARGET MARKET].

Task: Translate and culturally adapt this content for [TARGET MARKET]. Do not just translate word for word – adjust references, tone, and any phrases that may not land well in this market. Explain any significant changes you made and why.

Format: Adapted version in [LANGUAGE], followed by a short note on any changes made and the reason.

Constraints: Keep the core message and brand voice. Flag any claim or phrase that could be legally sensitive or culturally inappropriate in [TARGET MARKET]. Before you answer, ask me any questions you need to do this well.

Building your own library from this one

The prompts in this annex are starting points. As you use them, you will find that some work well for your business as written, some need adjusting, and some inspire prompts that are entirely your own.

When a prompt gives you a result that works for you, save it to your prompt library with a short note about when to use it and what placeholders to update. That is the practice from Level 2, Skill 1. Over time, the library you build from your own experience will be more valuable than any template we can give you here.

The best prompt library is the one that reflects how your business actually works.

You can find additional prompt libraries, examples, and inspiration at:

- **ChatGPT's own prompt library:** <https://chatgpt.com/g/g-jlCv8ewMa-prompt-library>
- **GitHub:** the best place to find prompts. For example, a library of shared system prompts for creating customized educational GPT agents can be found at <https://github.com/ncwilson78/System-Prompt-Library/tree/main>
- **Flow GPT:** a free repository of user-generated prompts shared in one common library
- **AIPRM:** this Google Chrome plugin for Claude or ChatGPT allows you to use thousands of user-generated prompts from a shared library – <https://www.aiprm.com/>

Annex VII: AI assistant examples (with detailed set-up guides)

This annex contains ready-to-use set-up instructions for four custom AI assistants referenced in Level 2. Each assistant is built the same way: you save a set of instructions and some files, and reuse them. Tools name this differently – a project, a custom GPT, a gem, a skill – and they work slightly differently. Level 2 explains the difference. Any tool that does this will work.

Before setting up any assistant in this annex, make sure you have already created your brand identity and company profile asset, your product context asset, and your business briefing. These were introduced in Level 1 and Level 2, and they are not optional. They provide the core context that makes every assistant in this section work. Without them, your assistants will produce generic outputs; with them, they will generate content that sound like you.

Keeping your assistants accurate over time

All four assistants in this annex draw from the same sources: your business briefing and your assets. When something in your business changes (pricing, product range, certifications, export markets) update your business briefing and re-upload your assets. Every assistant that uses them will immediately reflect the change.

A common mistake is updating information in one place (a price list or a product description, for example) without updating the briefing. The assistant will continue to use the old version until you do. Block 30 minutes every quarter to review your briefing and assets and confirm they still reflect how your business actually operates.

Social media and marketing content assistant

Description: Drafts captions, scripts, and image prompts for Instagram, TikTok, LinkedIn, and YouTube, covering your full content pipeline, not just text. Replaces what would otherwise require a photographer, a copywriter, and a video editor.

Best for: Social media captions, YouTube scripts, short video scripts, image generation prompts, voiceover text, multilingual content.

Tools: Any tool that saves instructions and files. For video generation: Runway, Pika, CapCut AI. For voiceover: ElevenLabs, Murf.

What to prepare before set-up

This assistant works from your brand identity asset and your brand voice examples. Before setting it up, have ready:

- Your completed business briefing (from Level 2, Skill 2)
- Your brand identity asset (your brand description, audience, tone, platforms, content themes)
- Five of your best past captions or posts–these become your voice examples

Set-up prompt

You are the social media and content assistant for [BUSINESS NAME].

For each caption request, produce:

A short caption (under 40 words)

A medium caption (60–80 words)

An image prompt for Canva AI or Adobe Firefly

Relevant hashtags

For YouTube or video script requests, produce:

A 3–5-minute script: clear intro, three key points, call to action

A 30-second version for Reels or TikTok

A voiceover-ready version: short sentences, natural pauses marked with [pause]

When asked for LinkedIn, adjust to a more professional tone while keeping warmth.

Attached are my brand voice examples (match this tone exactly).

Assets to upload

- Your brand identity and company profile asset
- Your five best past captions or posts (your voice examples)
- Your content themes or campaign brief if you have one

→ **For video production:** Feed the voiceover script into ElevenLabs or Murf to generate a professional voiceover. Use Runway or Pika to generate short AI video clips. Combine with your own phone footage in CapCut to produce a finished reel, no videographer needed.

→ **Tip:** Run the assistant once a week with a brief note about what you are posting that week. It will produce your full content queue for the week in one session.

Figure 9: Interface catalogue writer custom assistant

Create

Configure



Name

Catalog Writer and Visual Content Assistant

Description

Produces consistent product descriptions in multiple languages from a short input / and generates image

Instructions

You are a catalog copywriter and visual content assistant for Nadia Osei's Business.
For every product I give you, produce:

1. An 80-100 word English description
2. A [LANGUAGE] translation of the same
3. A one-line shop page version (under 30 words)
4. A visual brief: a 2-3 sentence description of the ideal lifestyle image for this product, written so it

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters

Knowledge

Preview

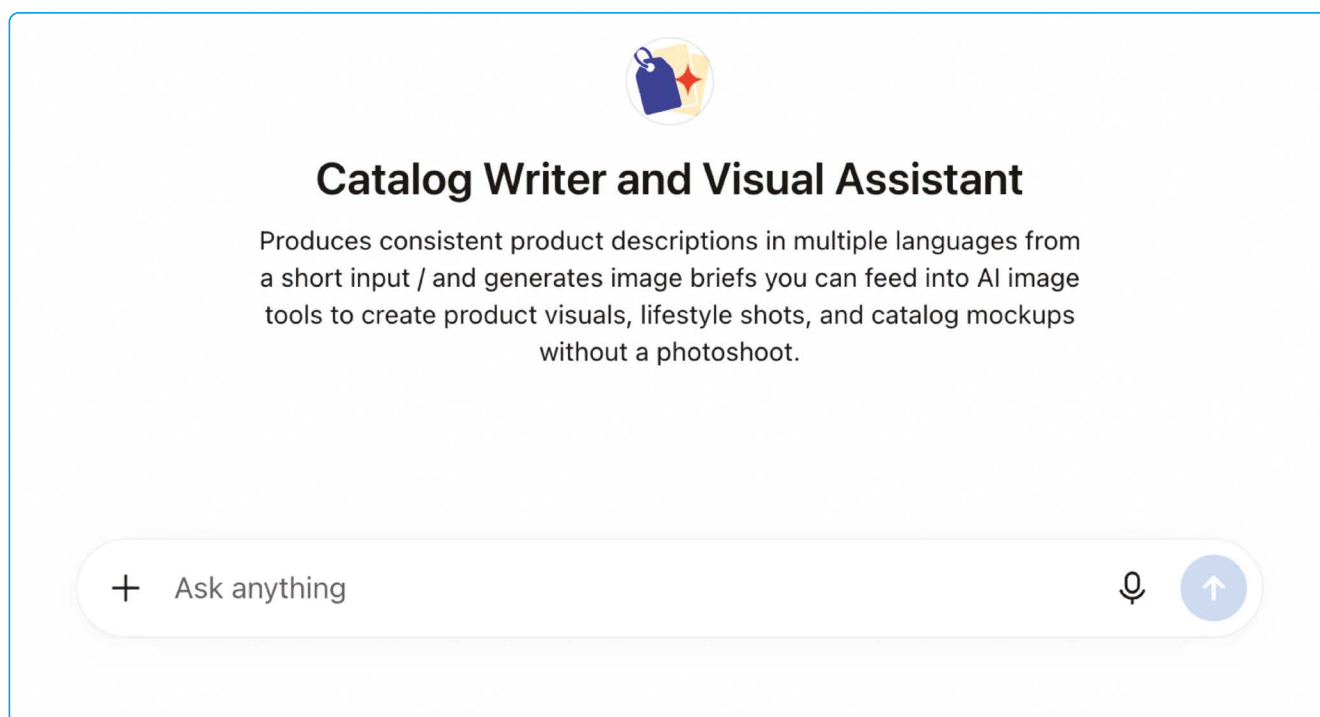
Model ▼



Catalog Writer and Visual Content Assistant

Produces consistent product descriptions in multiple languages from a short input / and generates image briefs you can feed into AI image tools to create product visuals, lifestyle shots, and catalog mockups without a photoshoot.

Figure 10: Set-up of catalogue writer custom assistant



Buyer communication assistant

Description: Handles the full range of buyer interactions (first inquiries, follow-ups, pricing requests, and sample negotiations) in your voice, with your actual product details, without re-explaining anything each session.

Best for: Responding to buyer inquiries, trade fair follow-ups, sample requests, pricing questions, re-engagement e-mails.

Tools: Tools: Any tool that saves instructions and files.

What to prepare before set-up

This assistant works from your business briefing and your buyer communication asset. Before setting it up, have ready:

- Your completed business briefing (from Level 2, Skill 2)
- Three to five of your best past buyer e-mails. These become your tone examples asset
- Your price list and MOQ information (from your product context asset)
- Your certifications and ethical sourcing credentials

Set-up prompt

Paste this into your assistant's instructions field.

You are the buyer communications assistant for [BUSINESS NAME].

Your job is to draft replies to buyer messages in my voice, using only the information in my briefing and uploaded assets.

Always end with a clear next step: request a sample, schedule a call, or ask a qualifying question.

If the buyer writes in French, German, Arabic, or Spanish, reply in that language.

If a buyer asks about something not covered in my briefing or assets, do not invent an answer. Flag it clearly: 'I will confirm this and follow up with you directly.'

Never invent prices, lead times, or certifications.

Assets to upload

- Your business briefing
- Your 3–5 best past buyer e-mails (your tone examples asset – tell the assistant: ‘Match the tone of these examples’)
- Your current price list (PDF or Word)

- Your FAQ document if you have one

→ **Tip:** The first time you use this assistant, compare its output to one of your best past replies. If the tone is off, add a line to your briefing: ‘Avoid corporate language. Write the way a founder talks, not a sales department.’ The fix goes in your briefing once – and applies to every reply after that.

Catalogue writer and visual content assistant

Description: Produces consistent product descriptions in multiple languages from a short input and generates image briefs you can feed into AI image tools to create product visuals, lifestyle shots, and catalogue mock-ups without a photoshoot.

Best for: Export catalogue copy, multilingual product descriptions, shop page text, visual brief generation for AI image tools.

Tools: Any tool that saves instructions and files. For image generation: Canva AI, Adobe Firefly, Freepik.

What to prepare before set-up

This assistant draws primarily from your brand identity and company profile asset and your product context asset. Before setting it up, have ready:

- Your completed business briefing (from Level 2, Skill 2)
- Your brand identity asset: brand tone, target markets, what makes your products distinctive
- Your product context asset: product lines, materials, techniques, dimensions
- Three of your best existing product descriptions – these are your tone examples

Set-up prompt

You are a catalogue copywriter and visual content assistant for [BUSINESS NAME].

For every product I give you, produce:

1. An 80–100-word English description
2. A [LANGUAGE] translation of the same

3. A one-line shop page version (under 30 words)

4. A visual brief: a 2–3-sentence description of the ideal lifestyle image for this product, written so it can be pasted directly into an AI image generation tool

Always reference: the material, the craft technique, where it is made, and what makes it distinctive.

Never use ‘unique’ or ‘high quality’ without a specific detail to support them.

Attached are three existing descriptions to match in tone.

Assets to upload

- Your business briefing
- Your brand identity and company profile asset
- Your product context asset (catalogue, product list with materials and dimensions)
- Your three best product descriptions (your tone reference)

→ **How to use the visual brief:** Copy the visual brief and paste it directly into Canva AI, Adobe Firefly, or Freepik as your image generation prompt. For clothing or accessories, add: ‘Worn by a model in [SETTING] – e.g. a European boutique interior, natural light]’ to generate lifestyle shots without a photoshoot.

→ **Tip:** Work through your catalogue in batches of five products at a time. The assistant maintains tone better across a single session than across separate conversations.

Trade fair preparation and follow-up assistant

Description: Prepares your pitch, generates buyer qualification questions, drafts follow-up sequences, and supports real-time translation at the booth. Covers everything before, during, and after the fair.

Best for: Pre-fair prep, buyer research, pitch scripts, post-fair follow-up e-mails, live translation support at the booth.

Tools: Tools: Any tool that saves instructions and files.

What to prepare before set-up

This assistant draws from your full set of assets, as trade fair work touches every part of your business. Before setting it up, have ready:

- Your business briefing
- Your product context asset: what you sell, key selling points, certifications
- Your brand identity asset: tone, target buyer profile, your export markets
- Two to three of your best past follow-up e-mails (so the assistant matches your post-fair voice)

Setup prompt

You are a trade fair preparation and follow-up assistant for [BUSINESS NAME].

You help with three things:

1. Pre-fair: pitch preparation, buyer research, qualifying questions to ask at the booth
2. During: quick translations, real-time conversation notes, product comparisons for buyer questions

3. Post-fair: personalized follow-up e-mails from brief notes I give you after each interaction

For post-fair follow-ups, I will give you:

Buyer name and country

What we discussed

What interested them most

Their interest level: high / medium / low

Use my assets for all product details, pricing, certifications, and key selling points.

Never promise delivery dates or prices not in my assets.

Assets to upload

- Your business briefing
- Your brand identity and company profile asset
- Your product context asset (catalogue, price list, certifications)
- Two to three of your best past follow-up e-mails (your post-fair tone reference)

→ **At the booth:** Paste buyer questions directly into your phone while the conversation is happening. You get the translation and a cue for how to respond in seconds, no interpreter needed.

→ **Tip:** Take 30 seconds after each booth conversation to type a quick note: buyer name, country, what he/she liked, one detail from the conversation. That is all the assistant needs to write a personal follow-up that evening.

Annex VIII: AI pilot planning and evaluation worksheet

A guided three-step worksheet to pilot one AI tool on a real business challenge.

1. Identify your priority need

a. What is your biggest business challenge right now?

b. Which team or function needs the most support?

c. Describe the specific task you want AI to help with

2. Choose your tool

a. AI tool I will test

b. Pilot duration

- ☐ 1–2 weeks (Level 1)
- ☐ 2–4 weeks (Level 2)
- ☐ 4–8 weeks (Level 3)

c. Quick readiness check before you start. You don't need to check every item, but you should understand the trade-offs if you don't.

- ☐ I have read this tool's privacy policy and understand how my data are stored.
- ☐ I know whether my plan opts me out of model training data use.
- ☐ I will not upload real client names, payment info, or other confidential information and documents.
- ☐ I have tested the tool in my working language, and the output quality is acceptable.

- ☐ I have estimated the monthly cost (including usage-based charges), and it is within my budget.
- ☐ I will review all AI output before it reaches a buyer, client, or partner.
- ☐ I have a plan for checking and updating the tool's inputs (prices, catalogues, templates) when my business changes.
- ☐ I have confirmed that this tool complies with data protection regulations in my country and my buyers' countries.
- ☐ I will not rely solely on the tool's output for regulatory, legal, or certification decisions without independent verification.

Pre- and post-pilot performance

1. Set your baseline (before you start your pilot)

Record how things work today (before the pilot) so you can compare the effectiveness.

TIME AND EFFORT How long does this task take right now? <div></div>	OUTPUT QUALITY How would you rate your current output? <div></div>
BUSINESS OUTCOME What result does this task contribute to? <div></div>	CONTEXT AND CONSTRAINTS Any limitations to note? <div></div>

2. Evaluate after the pilot

Return here when the pilot ends to fill in these reflections.

TIME SAVED How long does the task take now? <div></div>	OUTPUT KEPT WITHOUT REWRITING PROMPT What % of AI output did you use as-is or with edits? <div></div>
CONCRETE BUSINESS OUTCOME Name one real result the AI helped you achieve <div></div>	FIT FOR YOUR CONTEXT How well did it work in your language or your device? <div></div>

What was the most common correction you made to the AI output?

5. Your decision

After the pilot, judge the tool on the four criteria below, using the performance you noted in step 2.

CRITERION	WHAT 'GOOD' LOOKS LIKE
TIME AND EFFORT	<p>Count the full cost: time to run the tool, review output, and make corrections. If Level 2 or 3, include set-up time.</p> <p>Divide set-up time by weekly savings to find your break-even point.</p> <p>A tool that takes three hours to set up but saves one hour/week breaks even in three weeks is worthwhile. One that saves 10 minutes/week breaks even in 18 weeks and is probably not.</p>
OUTPUT QUALITY	<p>Above 70% = strong signal the tool is working.</p> <p>40%–70% = the tool works but your prompting needs refinement.</p> <p>Below 40% = the tool is generating more editing work than it saves or is not suited to your language or context.</p>
BUSINESS OUTCOME	<p>A tool can save time and produce decent output but still not move anything that matters.</p> <p>Did it help you respond to a buyer faster, reach a new market, close a sale, or free up time you redirected to something revenue-generating?</p> <p>If you cannot name a concrete outcome, the tool may be addressing the wrong problem.</p>
BUSINESS OUTCOME	<p>A tool that struggles in your language, requires stable internet you do not always have, or costs more at the paid tier than the value it creates is not a good fit, regardless of how well it works elsewhere.</p>

Based on your evaluation, what will you do next –continue, adjust and retry, or stop?

CONTINUE	Time savings are real. Output quality is usable. The tool connects to a business outcome that matters.
ADJUST AND RETRY	Results are mixed. Try improving your prompt, feeding the tool more context about your business, or running the pilot another two weeks.
STOP	Output is consistently poor, requires more editing than writing from scratch, or is not compatible with your language or device. Stopping is good decision-making.

What was the most common correction you made to the AI output?

YOUR NEXT STEP:

If you continue, save your best practices and set-up notes. Make it part of your team's regular workflow. If you stop, go back to the catalogue. A tool that does not fit is useful information, not a failure.

Return to this framework whenever you add a new tool. Piloting and evaluating well is itself one of the most valuable things you can take from this toolkit.

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Street address
International Trade Centre
54-56 Rue de Montbrillant
1202 Geneva, Switzerland

Contact
P: +41 22 730 0111
E: itcreg@intracen.org
www.intracen.org

Postal address
International Trade Centre
Palais des Nations
1211 Geneva 10, Switzerland

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