

CLIENT GUIDE

Your Business Owner Workbook: Quick Start

October 19, 2026

Welcome

Your Business Owner Workbook is where we write down how your business runs, so AI tools have something solid to work from. It's split into Parts and short sections, and you only see the sections that are part of your engagement. Most sections take 15 to 30 minutes. You don't have to finish one in a sitting: everything saves as you go.

Sign in at **workbook.smallbizdata.com** with the email your advisor invited.

Your Dashboard

- **Your Next Step:** the card at the top always shows the one thing to do next. It might be drafts your advisor left for you, the section you're partway through, or the next section to start. Click it to jump straight in.
- **Overall Progress:** how many of your sections are signed off.
- **Readiness Score:** a number from 0 to 100 that rises as you answer and sign off sections. See the Readiness Score explainer for how it works.
- **Part cards:** each Part shows its sections, how many are done, its own readiness number, and links to its presentation, video and playbooks. A small Draft tag means your advisor left something to review, and a speech bubble with a number means there are open comments.

The first time you sign in, a short tour walks you through this. You can replay it any time with **Take the Tour** under your business name.

Filling In a Section

- **It saves as you type.** There's no save button. Close the tab and come back later; your answers will be there.
- **Required answers are marked.** Exercises tagged **Required** need an answer before the section can be signed off. The header shows how many are left.
- **Skip what you don't know yet.** Leave it blank and come back, or ask your advisor in a comment.
- **Not applicable?** Some sections, like inventory if you don't hold stock, have a **Not applicable** button. You can restore the section later.
- **Confidence slider.** Rate how sure you are of your answers from 1 to 5. Be honest: it helps your advisor know where to dig in, and it feeds your readiness score.
- **Sections with copies.** A couple of sections repeat, such as one copy per AI tool you're evaluating or one per quarter. Use **Add** to start a new copy and the tabs to switch between them.

Drafts From Your Advisor

To save you typing, your advisor may draft answers for you, for example from notes taken during a meeting or from a spreadsheet you already have. Drafts are clearly marked and **don't count as your answer until you approve them**.

On any draft you can:

- **Accept** it as written.
- **Edit** it. Changing the draft makes it yours.

- **Discard** it if it isn't right.

If a section has several drafts, a banner at the top lets you **Accept All** or **Review Each**. When you already had an answer, the draft appears beside it as a suggested update, with the changes highlighted, so nothing you wrote is ever overwritten.

Asking a Question

Every exercise has a **Comment** button. Click it, type your question, and press **Post**. Your advisor sees it on their client list and replies in the same thread. When it's sorted, either of you can mark it **Resolve**. Open comments show as a small speech bubble with a count on your dashboard.

Signing Off a Section

When every required answer is in, the section shows **Ready for Review**. Read it over, then scroll to the **Key Decision** at the bottom: tick each item, type your full name and click **Sign Off**. That's what marks a section done. Your sign-offs build your decision log, and the Engagement Summary report lists them.

For sections with copies, like one per AI tool, each copy is signed off on its own. The section is done when every copy is signed off.

Your Reports

Open **Results** in the top menu for branded PDF reports: the Complete Workbook, one per Part, an Engagement Summary of your decisions, and a one-page Scorecard. Click **PDF**, then choose **Save as PDF** in the print window. The file is named with the date, your business and the report, ready to keep or share with your team.

Quick Answers

Who can see my answers? You and your advisor. Notes your advisor marks internal aren't visible to you, and nothing is shared outside the engagement. See smallbizdata.com/privacy.

Does AI make decisions for me? No. AI only suggests drafts. Nothing counts until you accept it, and you sign off every section yourself.

Can I change an answer after signing off? Yes, edit it any time. Ask your advisor if you want the section re-signed.

I'm stuck on a section. Leave a comment on the exercise, or bring it to your next call.

Need help? Email fred@smallbizdata.com.