AI Business Primer Template

This document serves as your business's internal reference for AI-assisted writing, design, and marketing. Fill in all sections with accurate, approved information. This ensures that AI-generated content reflects your brand voice, services, and compliance standards.

1. General Business Information

Field	Details
Company Name	
Business Type / Industry	
Licenses / Certifications	
Phone Number	
Email	
Website URL	
Office Locations	(List all addresses)
Service Area / Regions Served	(Cities, counties, or states)
Operating Hours	
Founded	(Year)
Years in Business	
Customers Served / Notable Stats	(E.g., "Over 10,000 clients served since 2010")
Facebook URL	
Instagram URL	
Google Review URL	
Yelp URL	

Field	Details
Youtube URL	
LinkedIn URL	

2. Company History & Story

Founding Story:

(Explain how and why the business was founded, who started it, and what problem they aimed to solve.)

Growth Milestones:

- Year-by-year or decade milestones (e.g., expanded into new services, opened new offices, rebranded, etc.)

- Highlight major achievements, awards, or innovations.

Current Mission Statement:

(Write 2–3 sentences about what drives your business today.)

Core Values:

(List 3–5 values that define your business approach — e.g., integrity, innovation, craftsmanship, responsiveness.)

3. Service Overview

List and describe each of your services in detail. Include process highlights, differentiators, selling points, and client benefits.

Example Structure for Each Service

Service Name

Summary:

(Brief 1–2 sentence overview of what the service is and who it's for.)

Process Outline:

1. Step-by-step description of how the service works.

2. Include any unique methods, tools, or expertise your team provides.

Why Clients Choose This Service:

- List 3–5 bullet points about what makes your approach different.

- Mention guarantees, eco-friendly options, speed, or reliability if applicable.

Key Stats or Results:

(Optional – include data, warranties, success rates, or case study references.)

Service Area Availability:

(Indicate whether this service is offered regionally, statewide, or nationwide.)

4. Pricing, Fees & Offers

Standard Estimate Policy:

(Clarify whether estimates are free, which regions qualify, and when inspection fees apply. Avoid giving exact prices unless fixed.)

Sample Statement (Editable):

> "Full cost of service depends on property size, condition, and inspection results. Would you like to schedule a free estimate?"

Special Offers / Packages:

Offer Name	Description	Valid Dates	Restrictions

5. What Sets You Apart

Use this section to train AI on how to position your brand.

Unique Advantages:

- (List what makes you stand out — e.g., in-house crews, long warranties, same-day service, etc.)

Customer Promise:

(Write a short, clear statement about your reliability or satisfaction guarantee.)

Eco & Safety Commitments:

(Describe any environmentally-friendly or safety-first policies.)

6. Tone of Voice & Brand Style Guide

Define your brand personality so AI-generated text matches your voice.

Tone Trait	Description / Example
Voice Type	(e.g., Professional yet friendly, confident, straightforward, educational)
Sentence Style	(e.g., Short, active, direct sentences; avoid jargon; conversational tone.)
Preferred Terms	(List key phrases, e.g., "termite estimate," not "inspection.")
Avoided Terms / Phrases	(Words or phrases you don't want used.)
Brand Pitch Examples	(2–3 examples of how you'd describe your company in a sentence.)
Formatting Preferences	(Use of bold, headings, or paragraph lengths for web/blog content.)

7. Example Brand Descriptions

Provide short "ready-to-use" blurbs AI can reuse or remix for different channels.

Short Description (25–40 words):

(Used for meta descriptions or social bios.)

Medium Description (60–100 words):

(Used for ad copy or service section intros.)

Long Description (150–200 words):

(Used for about pages or brochures.)