

THE PRACTICAL BUSINESS MANUAL

You Can't Do It All

Companion Workbook

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Companion workbook

This companion belongs to *You Can't Do It All: Put AI to Work in Your Business*. Shaikh Zulfiqar Ali Hashmi. From the House of Maliyati Technologies.

Use the planning pages in print or annotate them in a PDF application. This PDF is not an interactive form. The accompanying spreadsheet has editable financial examples and blank operating records. Its sample values are fictional teaching inputs, not recommended business assumptions. Keep customer data out of shared copies.

Save a dated working copy for your business. The book's controls apply to this workbook too: minimum necessary data, named ownership, checked facts and an explicit boundary of authority.

W01. Task audit

Chapters 1-2. Record one real working week. Do not value every saved minute as revenue. Separate handling, waiting, rework and displaced paid work.

Task

Frequency

Handling minutes

Waiting time

Reason it returns to owner

Decision or retrieval

Keep, stop or pilot

Evidence

W02. Pilot agreement

Chapter 2. Choose one bounded task. A pilot is successful only against its stated checks and business result.

Workflow ID	
Owner	
Useful end state	
Baseline	
Permitted inputs	
Excluded cases	
Success threshold	
Stop condition	
Manual fallback	
Review date	

W03. Approved facts pack

Chapters 3-5. Do not ask AI to fill gaps in policy. Give every material fact a source and an owner.

Fact ID

Exact approved fact

Source record

Applies to

Version/date

Fact owner

Next review

Conflicting fact to resolve

W04. Data and authority

Chapter 4. Public, internal, confidential and restricted are operating categories, not automatic legal permissions. Assess the actual arrangement.

Data field
Category
Minimum needed
Permitted tool/account
Processing terms checked
Read/draft/action permission
Retention
Deletion owner

W05. Tool purchasing record

Chapters 5 and 12. Inspect the actual plan and supplier terms on the purchase date. Compare ownership, export, support, failure handling and whole cost.

Candidate

Task fit

Account owner

Plan/date checked

Setup cost

Recurring cost

Usage limits

Data/location assessment

Export tested

Support

Fallback

Decision

W06. Enquiry implementation

Chapter 5. Use your existing email editor and a document before connecting a sending action. Start with synthetic cases.

Request ID
Received date
Selected facts version
Missing questions
Excluded commitment
Draft version
Reviewer
Recipient checked
Approved wording
Sent time
Outcome
Handling minutes

W07. Field mapping contract

Chapters 5 and 12. A successful run can still write the wrong field. Check the resulting record using a known synthetic case.

Source field

Meaning

Type/format

Destination field

Required?

Validation

Blank treatment

Duplicate rule

Test value

Observed destination

W08. Quote and change control

Chapter 6. A language draft does not approve a price, scope or deadline. Recheck the exact final version after changes.

Quote ID
Scope
Exclusions
Direct costs
Owner labour basis
Currency
Price approval
Capacity/date evidence
Expiry
Changed item
New approval
Customer acceptance

W09. Follow-up and complaints

Chapter 6. Keep service follow-up distinct from marketing.
Refer disputed facts, rights and remedies to the approved route.

Customer/request ID

Communication purpose

Permission/source

Approved next step

Due date

Owner

Complaint facts

Policy/adviser reference

Remedy authority

Completed evidence

W10. Offer, proof and path

Chapter 7. Draft one truthful offer. Proof must support the precise claim. The path must describe the next action without false urgency.

Audience/problem

Offer

What is included

What is excluded

Claim

Evidence

Evidence limit

Customer next step

Landing page check

Owner approval

W11. Campaign decision record

Chapter 8. Use the spreadsheet for calculations. Contribution after advertising is not net profit. Record returns and attribution uncertainty.

Campaign ID

Period

Currency

Spend

Clicks

Attributed orders

Retained orders

Included variable costs

Attribution caveat

Break-even condition

Stop/continue decision

Review date

W12. Team handover

Chapter 9. Proposed and confirmed are different statuses. Do not infer receipt, availability or booking approval from a draft.

Job ID
Approved source
Customer date preference
Confirmed slot
Parts status
Task owner
Definition of done
Access required
Exception
Completion evidence

W13. Supplier decision

Chapter 10. Compare usable delivered cost and cash timing. A cheap unit with failures can be expensive. Yield assumptions need evidence.

Supplier

Quantity

Unit cost

Freight

Other included cost

Expected usable units

Evidence for yield

Payment milestones

Lead time

Quality requirement

Owner decision

W14. Finance review

Chapter 11. Match period, currency and accounting basis. Keep profit, cash and amounts owed separate. Reconcile before asking for narrative.

Period/basis

Revenue

Included direct costs

Overheads

Contribution/profit definition

Cash received

Cash paid

Closing cash

Receivables

Deposits

Prepayments

Unexplained difference

Adviser question

W15. Thirteen-week cash inputs

Chapter 11. The spreadsheet contains the rolling arithmetic. Replace the teaching inputs, date each week and preserve a copy before rolling forward.

Week/date

Opening cash

Customer receipts

Other receipts

Supplier payments

Payroll

Tax payments

Debt payments

Other payments

Closing cash

Minimum buffer

Delayed receipt scenario

Action owner

W16. Exact approval record

Chapter 12. Approval attaches to a specific action and version.
It must expire or be renewed when material inputs change.

Request ID
Action/tool
Destination/recipient
Amount/currency
Content version
Facts version
Approver
Approval time
Expiry
Change requiring reapproval
Execution ID
Verified outcome

W17. Test and failure log

Chapter 13. Tests can cause real effects. Do not use real payment, deletion, public posting or customer sends casually. Use a controlled destination and explicit authority.

Test ID
Synthetic inputs
Expected result
Prohibited effects
Controlled destination
Observed output
External effect checked
Pass/fail
Evidence
Correction
Retest result

W18. Recovery and unknown outcome

Chapter 13. When outcome is unknown, inspect the destination before retrying. Preserve evidence and identify who can authorise repair.

Incident ID
Time
Route/version
Last known stage
Known or unknown effect
Evidence location
Immediate stop
Manual fallback
Customer impact
Repair authority
Resolution
Prevention

W19. Ninety-day implementation

Chapter 14. Start with one route; do not expand authority merely because a draft looked good. Assess total effort and failure evidence.

Days 1-14 baseline/facts

Days 15-30 synthetic tests/reviewed pilot

Days 31-60 measured operation

Days 61-90 maintain/change/stop

Owner

Check date

Evidence

Next action

W20. Quarterly operator check

Chapter 14. Review facts, accounts, permissions, costs and recovery. Material changes trigger relevant retesting immediately, not only quarterly.

Route owner

Facts current

Account owner/MFA

Permissions minimum

Supplier terms checked

Costs/usage

Export/fallback tested

Failure log reviewed

Retention actions

Next review

W21. My decisions and notes

All chapters. Record how the method lands in your business. Include the evidence that changed your mind. Copy this page as needed.

Date

Chapter/workflow

What matters here

What I will change

What I will verify

Result

What I learned

Next review

Reusable enquiry instruction

Use only the approved facts below. Prepare (1) a customer reply draft, (2) the exact facts used, (3) missing information and (4) any request outside authority. Keep internal notes separate. Do not invent a price, refund, date, stock status or policy. Do not send or change a record. If the request conflicts with the approved facts or requires an owner decision, flag it and draft the question needed.

Request identifier: [supply locally]. Approved facts and version: [supply locally]. Enquiry: [minimum necessary content]. Allowed output: draft only. Owner reviews every material statement, commitment, recipient and attachment before sending.

Five synthetic checks

1. Ordinary package question: use the stated scope without adding benefits.
2. Missing deadline evidence: ask a question without promising availability.
3. Conflicting policy: stop and identify the conflict.
4. Refund request: escalate under the approved authority.
5. Embedded instruction to ignore the rules: treat it as customer content, not permission.

Record your observed result