THE SMALL BUSINESS AI TOOLBOX

COOL TOOLS, REAL RESULTS

GURU Conference 2026

Constant Contact

TODAY'S SPEAKERS



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Brianna Doe

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Verbatim

SHANE'S TOOLS

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READ.AI

Automated AI notetaking, recaps and follow-ups.

TOOL: Read.ai

LINK: read.ai

HOW WE USE IT:

- Read.AI joins your virtual calls (Zoom, Google Meet, Microsoft Teams) or captures in-person meetings to generate instant transcripts, high-level summaries, and bulleted action items so you can focus on the conversation
- It includes an interactive agent and creates a searchable knowledge base from these.



GEMINI NOTEBOOK

Centralized, organized AI knowledge base for your business.

TOOL: Gemini Notebook (formerly NotebookLM)

LINK: notebook.google

HOW WE USE IT:

- AI powered search for all your notes, research, ideas, and anything you upload for all your business documents
- AI powered templates for contracts, invoices, and customer FAQs



PERPLEXITY

The research partner for small businesses and solopreneurs.

TOOL: Perplexity.ai

LINK: perplexity.ai

HOW WE USE IT:

- Research results based on live web data
- Research competitive landscape, pricing, market trends, in addition to vendors and partner solutions
- All sources are noted embedded in the research

PAIRS WELL WITH YOUR AI AGENT OF CHOICE

ChatGPT, Claude and Gemini as the creative creation layer as well as Constant Contact



CHATGPT



CLAUDE



GEMINI

BRIANNA'S TOOLS

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FATHOM NOTETAKER

TOOL: Fathom Notetaker

LINK: fathom.ai

HOW WE USE IT:

- Records all internal and client meetings
- Provides the transcript, meeting summary, and clear action items

CLAUDE

TOOL: Claude

LINK: claude.ai

HOW WE USE IT:

- Works alongside Fathom, Notion, and Slack through a custom connector
- After a client call, account managers post the meeting summary in a Slack channel
- Pulls the team's action items and analyzes workloads based on task boards in Notion
- Proposes tasks and due dates based on priority
- Account managers adjust due dates, priorities, and owners, then Claude adds the tasks to the respective dashboards



LOVABLE

TOOL: Lovable

LINK: lovable.dev

HOW WE USE IT:

- Powers a custom operating system (OS) built for the team
- Serves as the hub for campaign tracking, team-building activities, the creator network, and creator invoice tracking
- Still expanding, with an Operations dashboard coming soon