# Marketing and Sales Toolkit: AI Prompts for Founders

Reach the right customers, follow up properly, and turn interest into sales.

## About this toolkit

Four AI prompts that help a founder market and sell with a plan: know your best customers, decide where to spend your marketing budget, keep track of every potential sale, and post regularly. Each prompt makes the AI act as a marketing and sales adviser: it asks about your business and customers first, then builds the document around them.

**Who it is for:** founders who are selling but rely on word of mouth and occasional posts, and want steadier sales without a big marketing budget.

**What each prompt comes with:**

- The problem it solves, in plain words
- The prompt itself, ready to copy
- A ready-to-use Word or Excel file, created by the AI for your business
- A sample output from our fictional sample business
- A short "check before you rely on this" list
- The decisions to make from the result

**Work through them in order.** Customer profiles tell you who to target. The marketing plan decides where to spend. The pipeline tracker turns interest into sales. The calendar keeps your marketing going week after week.

## How to use these prompts

You don't need any technical skills: copy, paste, answer questions, then review.

1. Open an AI assistant that can create files, such as Claude, ChatGPT, Gemini or Microsoft Copilot.
2. Copy everything inside the grey prompt box and paste it into a new chat.
3. Answer the AI's questions one at a time. Describe your real customers and real results, not the ones you hope for.
4. Review the output with the "check before you rely on this" list.
5. Ask for changes in plain words, for example "make the captions sound more like how we talk on WhatsApp".
6. Download the Word or Excel file the AI creates and save it. If your AI tool can't create files, it will give you the text or tables to paste in yourself.

**Protect your customers' privacy.** Don't paste customer names, phone numbers or addresses into free AI tools. Describe customers by type instead.

**Keep your marketing honest.** The prompts tell the AI not to invent reviews, testimonials or claims. Only publish what you can prove.

## The sample business

*Ewa Foods Ltd is a fictional business created by Outlier Venture Lab for illustration. Its figures are realistic but invented.*

Ewa Foods makes plantain chips and pepper soup spice blend in Ikorodu, Lagos, and sells about ₦5 million a month through two supermarket chains, distributors, Instagram and WhatsApp. Its marketing budget is ₦120,000 a month, and the founder posts on Instagram when she has time.

For 2027, Ewa wants to grow sales to ₦72 million, launch a 50g snack pack, sign a third supermarket chain and sell more spice blend online, where customers pay upfront.

## Prompt 1: Who is my ideal customer?

**Builds:** two or three customer profiles based on your real customers, with what makes them buy, what stops them, and where to reach them. **Word file:** Customer Profiles.

### The prompt (copy everything in the box)

```
Act as an experienced marketing and sales adviser who works with small businesses and
early-stage founders in Nigeria and Africa.

Help me describe my ideal customers clearly, so my marketing speaks to the right people in
the right places. Base everything on what I know about my real customers, and mark
anything that still needs testing.

How to work with me:
- Ask the questions below ONE AT A TIME and wait for each answer.
- Keep your replies short: no more than 3 or 4 sentences between questions. Save
explanations for the final results.
- If I'm unsure about an answer, help me think it through with one or two simple follow-up
questions.

Question 1: What is my business called, and what does it do?
Question 2: Who are my best customers today: the ones who buy most often, pay on time and
recommend me? Describe two or three of them.
Question 3: Do I sell to individuals, to businesses, or both? If both, who decides to buy
in each case?
Question 4: What problem or need makes them look for a product like mine?
Question 5: Why do they choose me, and what nearly stops them from buying (price, trust,
delivery, availability)?
Question 6: Where do they spend time, online and offline, and where do they hear about
products like mine?
Question 7: How do they prefer to pay and to order (cash, transfer, POS, WhatsApp, in
store, online)?
Question 8: Which customers are NOT a good fit for me, and why?

Definitions:
- A "customer profile" describes one type of customer: who they are, what they need, what
stops them buying, and how to reach them.
- Mark each point as "Known" (from real customers or sales records) or "To test" (a
reasonable guess I should check).

Then produce, in the chat:
A. Two or three customer profiles in a side-by-side table: who they are; what they need;
what triggers a purchase; what stops them; where to reach them; the message most likely to
work.
B. Which profile matters most for my growth this year, and why.
C. The customers I should stop spending effort on.
D. Three quick ways to test the "To test" points in the next 30 days, such as asking five
customers or running a small offer.
E. A list of any assumptions you made.

Describe customers by their needs and habits, not by stereotypes about age, gender,
religion or ethnicity. Do not invent market statistics, customer quotes, reviews or
testimonials. Do not suggest health or performance claims I can't prove. If I run paid
adverts, remind me to check the advertising rules that apply (in Nigeria, ARCON) and any
product rules (for food and drink, NAFDAC).

WORD FILE: Also create a downloadable Word document (.docx) with one page per customer
profile and a final page with the priorities and tests. Name the file "[my business name]
Customer Profiles". Use clear headings, simple tables and plain English. If you cannot
create files, tell me clearly, then give me the full text with headings so I can paste it
into Word or Google Docs.

Finish by asking me: "Which test will you run first, and which customers will you ask?"
```

### Sample output: Ewa Foods

| | Supermarket snack buyer | Supermarket category buyer | Home cook buying spice online |
|---|---|---|---|
| Who they are | Working adults in Lagos buying snacks for home, school lunch boxes and the office (Known) | The person at a supermarket chain who decides which snacks get shelf space (Known) | People who cook Nigerian soups at home, in Lagos and abroad, and order through Instagram or WhatsApp (Known) |
| What they need | A tasty snack at a fair price that's easy to find | Products that sell quickly, arrive on time and have NAFDAC numbers | Authentic taste without grinding spices themselves |
| Trigger to buy | Seeing it on the shelf near the till; tastings (To test) | Proof of sales in other stores; reliable supply | A craving, an occasion or running out of their last jar |
| What stops them | Price above ₦1,000 per pack; unfamiliar brand | Long payment terms they want; doubts about supply in busy months | Delivery cost and time, especially abroad |
| Where to reach them | In store; Instagram; WhatsApp Status of existing customers | Direct visits with sales figures and samples | Instagram recipe videos; WhatsApp broadcast list |
| Message most likely to work | "Real plantain, real crunch, made in Lagos" | "Sells steadily in two chains; on-time delivery every week" | "Pepper soup the way home tastes, ready in minutes" |

**Priority for 2027:** the home cook buying spice online. These customers pay upfront and buy Ewa's higher-margin product, so every new one helps cash flow.

**Stop spending effort on:** small hotels and restaurant kitchens. They want big discounts and 90-day credit.

**Tests for the next 30 days:** ask ten repeat WhatsApp customers how they first heard of Ewa; run two in-store tastings and count sales against a normal day; offer free delivery on orders above ₦10,000 for two weeks and compare orders.

### Check before you rely on this

☐ Is each profile based on real customers, not guesses?

☐ Are "To test" points clearly marked?

☐ Does any profile rely on stereotypes about age, gender or background?

### Decide from this

- Which customer type deserves most of your effort this year?
- Which test will you run first?

## Prompt 2: How will I reach and win customers?

**Builds:** a 12-month marketing plan with goals, messages, a channel plan that fits your budget, quarterly campaigns and the numbers to track. **Word file:** Marketing Plan.

### The prompt (copy everything in the box)

```
Act as an experienced marketing and sales adviser who works with small businesses and
early-stage founders in Nigeria and Africa.

Help me write a simple, practical marketing plan for the next 12 months that fits my
budget and helps me win and keep the right customers.

How to work with me:
- Ask the questions below ONE AT A TIME and wait for each answer.
- Keep your replies short: no more than 3 or 4 sentences between questions. Save
explanations for the final results.
- If I'm unsure about an answer, help me think it through with one or two simple follow-up
questions.
- If I have used the OVL customer profile prompt or my annual plan, I can paste them.

Question 1: What is my business called, and what does it do?
Question 2: What are my sales goals for the next 12 months?
Question 3: Who are my main customer types? Paste my customer profiles if I have them.
Question 4: What marketing am I doing now, what has worked, and what hasn't?
Question 5: Where do most of my customers come from today?
Question 6: What is my monthly marketing budget, and who will do the work (me, staff, a
freelancer)?
Question 7: What do competitors do in their marketing, and how am I different?
Question 8: Are there seasons, holidays or events when my sales rise or fall?

Definitions:
- A "channel" is a way of reaching customers: for example Instagram, WhatsApp, in-store
tastings, distributors, referrals, events.
- "Cost to win a customer" = marketing spend on a channel divided by new customers it
brought in.

Then produce, in the chat:
A. Two or three marketing goals linked to my sales goals, each with a number and a date.
B. My key message for each customer type, in one or two sentences.
C. A channel plan: which channels to use, why, the monthly budget for each, who runs it,
and how to measure results. Focus on no more than four channels.
D. A quarter-by-quarter plan of the main campaigns.
E. The numbers to track every month, including cost to win a customer for each channel.
F. What to stop doing.
G. A list of any assumptions you made.

The budget must add up to the amount I gave you. Do not invent market statistics, customer
quotes, reviews or testimonials. Do not suggest health or performance claims I can't
prove. If I run paid adverts, remind me to check the advertising rules that apply (in
Nigeria, ARCON) and any product rules (for food and drink, NAFDAC).

WORD FILE: Also create a downloadable Word document (.docx) with the goals, messages,
channel and budget table, quarterly campaigns and measures. Name the file "[my business
name] Marketing Plan". Use clear headings, simple tables and plain English. If you cannot
create files, tell me clearly, then give me the full text with headings so I can paste it
into Word or Google Docs.

CALCULATIONS: If you can run code, use it for every calculation and to build any file.
Check every total before you show it. If a figure in the chat and the same figure in the
file disagree, tell me, and treat the file's formula as correct.

Finish by asking me: "Which campaign will you start first, and who will run it?"
```

### Sample output: Ewa Foods, 2027

**Marketing goals:** three new retail outlets every quarter; online and WhatsApp spice sales up from about ₦300,000 to ₦600,000 a month by December 2027; 300 festive bundles sold in December 2027.

### Channel plan and budget

| Channel | Why | Monthly budget | Run by | Measure |
|---|---|---|---|---|
| Instagram and WhatsApp content | Reaches home cooks who pay upfront | ₦60,000 (freelancer) | Freelancer, checked by sales officer | Online orders; cost to win a customer |
| Boosted Instagram posts | Extends reach to new home cooks in Lagos and abroad | ₦30,000 | Freelancer | Enquiries and orders per ₦10,000 spent |
| In-store tastings | Turns shoppers into buyers and shows supermarkets the product sells | ₦30,000 | Sales officer | Packs sold on tasting days against normal days |
| Direct visits to supermarket buyers | Wins new outlets | No extra cost | Sales officer | New outlets each quarter |
| **Total** | | **₦120,000** | | |

**Campaigns by quarter:** Q1, launch the 50g pack at ₦500; Q2, "pepper soup season" recipe series for the rainy months; Q3, pitch to the third supermarket chain with tasting results; Q4, festive and corporate gift bundles with 50% deposits.

**Stop doing:** printing flyers with no way of tracking results, and giving free samples to hotels that don't order.

### Check before you rely on this

- ☐ Does the budget add up to what you can actually spend?
- ☐ Is each channel linked to a measure you can track?
- ☐ Are there four channels or fewer?
- ☐ Are all claims in your messages true and provable?

### Decide from this

- Which campaign starts first?
- Which channel will you drop if it doesn't perform after three months?

## Prompt 3: Where are my sales getting stuck?

**Builds:** a sales pipeline that shows every potential customer, their stage, the next action, and how much sales you can realistically expect. **Excel file:** Sales Pipeline.

### The prompt (copy everything in the box)

```
Act as an experienced marketing and sales adviser who works with small businesses and
early-stage founders in Nigeria and Africa.

Help me set up a simple sales pipeline tracker, so I can see every potential customer,
what stage they are at, what to do next, and how much sales I can realistically expect.

How to work with me:
- Ask the questions below ONE AT A TIME and wait for each answer.
- Keep your replies short: no more than 3 or 4 sentences between questions. Save
explanations for the final results.
- If I'm unsure about an answer, help me think it through with one or two simple follow-up
questions.

Question 1: What is my business called, and what does it do?
Question 2: How do I usually win a new customer? Walk me through the steps from first
contact to first payment.
Question 3: Roughly how long does that take, and where do I usually lose people?
Question 4: Who on my team handles sales and follow-up?
Question 5: List the potential customers I'm talking to now. For each: who they are, what
stage they are at, how much they could buy, and the next step.

Definitions:
- Use these stages unless my process needs different ones: Lead (10%), Contacted (20%),
Sample or demo given (30%), Negotiating (60%), Won (100%), Lost (0%). The % is the chance
of winning the deal.
- "Weighted value" = expected value of the deal multiplied by the chance of winning it.
- Every open deal must have a next action, an owner and a date.

Then produce, in the chat:
A. My pipeline as a table: customer, stage, expected value, chance of winning, weighted
value, next action, owner, date.
B. The total weighted value of open deals, and how it compares with my sales target.
C. The three deals to focus on this week, and why.
D. Where my process loses most customers, and one change to fix it.
E. A list of any assumptions you made.

Use Nigerian Naira (₦) unless I say otherwise. Do not invent customers: use only the ones
I give you.

EXCEL FILE: Also create a downloadable Excel file (.xlsx) named "[my business name] Sales
Pipeline" with these sheets:
- "Pipeline": one row per deal, with a drop-down list for stage, the chance of winning
filled in automatically from the stage, weighted value calculated by formula, and next-
action dates that turn red when overdue.
- "Summary": formulas that total the number and weighted value of deals at each stage, and
compare the weighted total with a yellow target cell.
- "Stages": the list of stages and their % chances, in yellow cells I can edit.
Format money in Naira with thousand separators. Use live Excel formulas, never typed-in
totals. If you cannot create files, tell me clearly, then give me each sheet as a table I
can paste straight into Excel.

CALCULATIONS: If you can run code, use it for every calculation and to build any file.
Check every total before you show it. If a figure in the chat and the same figure in the
file disagree, tell me, and treat the file's formula as correct.

Finish by asking me: "Which three follow-ups will you make this week?"
```

### Sample output: Ewa Foods, November 2026

| Potential customer | Stage | Expected value | Chance | Weighted value | Next action and date |
|---|---|---|---|---|---|
| Supermarket chain C (12 stores) | Negotiating | ₦600,000 a month | 60% | ₦360,000 | Send revised price list by 25 Nov |
| Distributor, Ikeja | Sample given | ₦400,000 a month | 30% | ₦120,000 | Call for feedback by 20 Nov |
| Corporate gift order, Victoria Island firm | Contacted | ₦1,500,000 one-off (December) | 20% | ₦300,000 | Send bundle options and deposit terms by 22 Nov |
| Online spice reseller, United Kingdom | Lead | ₦250,000 a month | 10% | ₦25,000 | Reply with export price list by 30 Nov |
| Mini-mart group, Ikorodu (4 shops) | Won | ₦150,000 a month | 100% | ₦150,000 | First delivery on 18 Nov |
| Hotel kitchen, Lekki | Lost | | 0% | | Lost on price; review in six months |

**Open pipeline:** four deals with a weighted value of ₦805,000. Owner for all open deals: the sales officer.

**Focus this week:** supermarket chain C, the largest deal and closest to closing; the corporate gift order, because December is weeks away; the Ikeja distributor, before the samples are forgotten.

**Where deals get stuck:** after samples are given. Two of the last five sample deals went quiet because nobody followed up within a week. Fix: every sample gets a follow-up call date on the day it is delivered.

### Check before you rely on this

☐ Does every open deal have a next action, an owner and a date?

☐ Are expected values realistic, based on what the customer said?

☐ In the Excel file, change a stage and check the chance and weighted value update.

### Decide from this

- Which three follow-ups will you make this week?
- What will you change where deals get stuck?

## Prompt 4: What should I post, and when?

**Builds:** a 3-month marketing calendar with weekly themes, post ideas and captions, linked to your sales goals. **Excel file:** Marketing Calendar.

### The prompt (copy everything in the box)

```
Act as an experienced marketing and sales adviser who works with small businesses and
early-stage founders in Nigeria and Africa.

Help me plan my marketing content for the next 3 months, so I post and promote regularly
instead of when I remember, and every post supports a sales goal.

How to work with me:
- Ask the questions below ONE AT A TIME and wait for each answer.
- Keep your replies short: no more than 3 or 4 sentences between questions. Save
explanations for the final results.
- If I'm unsure about an answer, help me think it through with one or two simple follow-up
questions.
- If I have a marketing plan from the OVL marketing plan prompt, I can paste it.

Question 1: What is my business called, and what does it do?
Question 2: Which 3 months should the calendar cover?
Question 3: What am I trying to sell or promote in that period (products, offers,
launches)?
Question 4: Which channels do I use (for example Instagram, WhatsApp Status, TikTok,
Facebook, LinkedIn, in-store, email)?
Question 5: How often can I realistically post, and who will create the content?
Question 6: What holidays, seasons or events in that period matter to my customers?
Question 7: What content has worked best for me so far?

Definitions:
- A "content theme" is the main topic for a week or fortnight, tied to a product or offer.
- Each post should have one clear call to action, such as "order on WhatsApp" or "find us
in store".

Then produce, in the chat:
A. A calendar table by week: dates, theme, posts for each channel, call to action, offline
activity, and owner.
B. Ten ready-to-use post ideas with a short caption for each, written in a natural, local
voice.
C. A simple weekly routine for creating and posting content in no more than 2 to 3 hours.
D. The numbers to check each week.
E. A list of any assumptions you made.

Only plan as many posts as I said I can manage. Do not invent market statistics, customer
quotes, reviews or testimonials. Do not suggest health or performance claims I can't
prove. If I run paid adverts, remind me to check the advertising rules that apply (in
Nigeria, ARCON) and any product rules (for food and drink, NAFDAC).

EXCEL FILE: Also create a downloadable Excel file (.xlsx) named "[my business name]
Marketing Calendar" with these sheets:
- "Calendar": one row per post or activity, with date, channel, theme, caption idea, call
to action, owner, and a status drop-down (Planned, Ready, Posted) coloured automatically.
- "Results": one row per week with yellow cells for reach, messages or enquiries, and
orders, and formulas that show totals and change from the previous week.
If you cannot create files, tell me clearly, then give me each sheet as a table I can
paste straight into Excel.

Finish by asking me: "When will you create next week's content, and who will post it?"
```

### Sample output: Ewa Foods, January to March 2027 (extract)

| Weeks | Theme | Instagram and WhatsApp | Offline | Call to action |
|---|---|---|---|---|
| 5 to 18 Jan | New year, new snack pack | Launch video of the 50g pack; "lunch box" photos | Tastings in two supermarkets | Find it in store |
| 19 Jan to 1 Feb | Behind the scenes | Short videos of frying and packing; meet the team | None | Order on WhatsApp |
| 2 to 15 Feb | Valentine's snack box | Chips and spice gift box; customer photos shared with permission | Gift boxes at checkout in one store | Pre-order with deposit |
| 16 Feb to 1 Mar | Pepper soup at home | Recipe reels using the spice blend | None | Order online |
| 2 to 15 Mar | Made in Lagos | Story of the plantain farmers and suppliers | Tasting at a weekend market | Visit our stand |
| 16 to 31 Mar | Easter hosting | Party snack bundles; recipe for spicy chips | Bundles in all stores | Order before Easter |

**Sample caption:** "New year, same crunch. Our plantain chips now come in a 50g pack for ₦500, just right for lunch boxes. Find them in store this week or send us a message to order."

**Weekly routine:** Monday, freelancer drafts the week's posts; Tuesday, sales officer approves; posts go out Tuesday, Thursday and Saturday; Friday, record reach, enquiries and orders in the Results sheet.

### Check before you rely on this

☐ Can you really post as often as the calendar says?
☐ Does every post have one clear call to action?
☐ Do you have permission for any customer photos?
☐ Are holiday dates correct for your customers?

### Decide from this

- Who creates and who approves the content?
- Which weekly numbers will you check, and when?

## Check before you rely on any AI marketing output

Run through this list every time, whichever prompt you used.

☐ **It is about your real customers.** Profiles, deals and results come from your own records. Delete anything the AI made up.

☐ **It is honest.** No invented reviews, testimonials, statistics or health claims.

☐ **It fits your budget and time.** The spending adds up, and the posting plan is something your team can keep up.

☐ **It can be measured.** Every channel and campaign has a number you will track.

☐ **It follows the rules.** Paid adverts and product claims meet advertising rules (in Nigeria, ARCON) and product rules (for food and drink, NAFDAC).

☐ **It is saved and dated.** Save each file with the date in its name, and update the pipeline every week.

The AI is a fast assistant, not someone who knows your customers. Talk to real customers often: it is the cheapest marketing research there is.

## Next steps

With these four documents, you know who to target, where to spend, which deals to chase, and what to post each week.

- **Retake the Business Health Check** in three months to see how your Marketing and Sales score has changed.
- **Use the other toolkits.** Finance, Strategy, People, Operations, and Performance follow the same format.
- **Get expert support.** Outlier Venture Lab works with founders on growth strategy, financial models and fundraising. Get in touch through our website to book a session.

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