



QUICK START USER GUIDE FOR SMALL BUSINESS OWNERS

Using MentalNotes.ai and Lila: Your
Chief-of-Staff and Reflection Guide



WELCOME: WHY SMALL BUSINESS OWNERS NEED LILA

Running a small business means juggling endless priorities with limited time and resources.

MentalNotes.ai's Lila serves as your AI-powered Chief-of-Staff, helping you streamline operations, reflect on your leadership, and manage your team's energy for sustainable growth.

Lila is here to help you:

- ❖ Save time by automating routine tasks
- ❖ Gain clarity and focus through guided reflection
- ❖ Overcome resource constraints with actionable plans and best practices

GETTING STARTED WITH MENTALNOTES.AI AND LILA

Step 1: Familiarize yourself with our site

- ❖ Visit MentalNotes.ai
- ❖ Define your primary goals: operational efficiency, leadership growth, team alignment, or all of the above.

Step 2: Meet Lila

- ❖ Lila stands for Leadership Intelligence and Learning Assistant.
- ❖ She can act as your Chief-of-Staff, Executive Coach, or Reflection Guide - tailor her role to your needs.

HOW TO BEST INTERACT WITH LILA

Best Practices:

- ❖ **Be Clear and Specific:** The more detail you provide, the more tailored Lila's response will be.
 - Instead of "How do I improve my team?" try "What are three ways I can improve team accountability during a project?"
- ❖ **Use Open-Ended Questions:** Encourage deeper insights.
 - "What are some ways to improve communication in a hybrid team?"

- ❖ **Ask for Templates or Resources:** Lila can generate agendas, checklists, job descriptions, and more.
 - “Lila, draft a 30-minute meeting agenda to discuss team goals.”
- ❖ **Iterate and Follow Up:** If you need more detail, ask Lila to expand or clarify.
- ❖ **Organize Responses:** Save Lila’s insights and templates for future reference-consider using a shared folder or document.

Tips for Effective Use:

- ❖ Be honest and provide context.
- ❖ Experiment with different prompt styles.
- ❖ Refine your questions as you learn what works best.





LILA AS YOUR CHIEF-OF-STAFF: TASK EXECUTION

Lila can execute and streamline a wide range of business tasks:

- ❖ **Project Plans:** “Lila, create a project plan for launching a new service.”
- ❖ **Research:** “Lila, research local competitors and summarize their pricing strategies.”
- ❖ **Drafting Communications:** “Lila, write an email to announce our new product to customers.”
- ❖ **HR Support:** “Lila, write a job description for a part-time bookkeeper.”
“Lila, create interview questions for a sales associate role.”
- ❖ **Operational Checklists:** “Lila, make a checklist for onboarding new team members.”
- ❖ **Meeting Agendas:** “Lila, draft a 45-minute meeting agenda to introduce the Energy Loop to my team.”[1]



LILA AS YOUR REFLECTION GUIDE

Reflection is essential for leadership growth and business resilience. Lila's "Think, Ask, Do" system makes it easy:

- ❖ **Think:** Pause and reflect on what went well and what could improve.
 - "What is the most valuable lesson I learned this week?"
- ❖ **Ask:** Dive deeper with reflection prompts.
 - "How did I handle a recent challenge, and what would I do differently next time?"
- ❖ **Do:** Turn insight into action.
 - "What is one thing I can do differently next week to improve my team's performance?"

Examples of Reflection Prompts:

- ❖ "Lila, what are three questions I should reflect on after a challenging team meeting?"
- ❖ "Help me identify lessons learned from a recent project setback."
- ❖ "What steps can I take to improve my communication with my team?"

LILA AS YOUR EXECUTIVE COACH

Use Lila for targeted advice, skill-building, and leadership development:

- ❖ **Advice on Specific Topics:** “Lila, how can I delegate more effectively?”
- ❖ **Problem-Solving:** “Lila, help me resolve a conflict between team members.”
- ❖ **Best Practices:** “Lila, what are best practices for onboarding new employees?”
- ❖ **Skill Development:** “Lila, suggest ways I can improve my time management as a business owner.”





THE ENERGY LOOP: YOUR LEADERSHIP FRAMEWORK

What Is the Energy Loop?

The Energy Loop is a practical, science-backed framework for managing human energy in your business.

It consists of three stages:

Stage	Purpose	Example Lila Prompt
Spark	Ignite motivation and purpose	<i>"Lila, how can I create a clearer vision for my team?"</i>
Harness	Align efforts, clarify roles, resolve conflicts	<i>"Lila, help me clarify team roles for our new project."</i>
Release	Celebrate wins, foster renewal, reflect	<i>"Lila, suggest ways to celebrate small wins remotely."</i>

Why It Matters:

- ❖ Keeps you and your team engaged, focused, and resilient—even with limited resources.
- ❖ Prevents burnout and builds a culture of recognition and renewal.

How Lila Helps:

- ❖ Drafts meeting agendas to introduce the Energy Loop.
- ❖ Provides exercises for vision alignment, communication, and celebrating wins.
- ❖ Diagnoses “energy blockers” and suggests actionable solutions.

SAMPLE PROMPTS AND USE CASES

Scenario	Example Prompt for Lila
Create a project plan	<i>“Lila, outline a marketing campaign for our new product.”</i>
Reflect on business progress	<i>“Lila, what were our top three wins this month?”</i>
Draft a customer email	<i>“Lila, write an announcement for our new location.”</i>
Write a job description	<i>“Lila, create a job posting for a sales associate.”</i>
Solve a team conflict	<i>“Lila, suggest steps to resolve a disagreement between staff.”</i>
Apply the Energy Loop	<i>“Lila, how can I spark energy in my remote team?”</i>

MAXIMIZING LILA'S VALUE

- ❖ **Define Lila's Role:** Be clear about what you want-task execution, coaching, or reflection.
- ❖ **Use Example-Driven Prompts:** The more specific, the better the results.
- ❖ **Regular Check-Ins:** Use Lila for weekly reviews or planning sessions.
- ❖ **Leverage Templates:** Ask Lila for reusable agendas, checklists, and feedback forms.
- ❖ **Integrate with Other Tools:** Use Lila's outputs in your CRM, email, or project management platforms.

TROUBLESHOOTING AND SUPPORT

- ❖ **Common Issues:** If Lila's response isn't what you expected, clarify your prompt or provide more context.
- ❖ **Help Center:** Access FAQs and user forums via MentalNotes.ai.
- ❖ **Direct Support:** Contact the MentalNotes.ai support team for technical or account issues.



APPENDIX: FURTHER RESOURCES

- ❖ **Glossary:** Definitions of key terms (AI, Energy Loop, feedback loop, etc.)
- ❖ **Exercises:** Vision alignment, communication reflection, celebrating wins, role clarity, feedback mapping, and more (see Energy Loop Handbook appendix for templates and activities).
- ❖ **Additional Reading:** Research and case studies supporting the Energy Loop framework.

Start Today

Lila is your on-demand partner for smarter operations, better leadership, and a more energized business.

Try these sample prompts, [explore the Energy Loop](#), and let Lila help you unlock your full potential as a small business owner.

For more in-depth guidance, see the full Energy Loop Handbook and the MentalNotes.ai User Guide for templates, exercises, and real-world examples tailored to your business needs.

APPENDIX

Lila Prompt Library: Common Use Cases

Use Case	Example Prompt for Lila	Output Type
Project Planning	<i>"Lila, create a project plan for launching a new product."</i>	Step-by-step plan
Research	<i>"Lila, research our top three local competitors."</i>	Summary report
HR Support	<i>"Lila, draft a job description for a part-time bookkeeper."</i>	Job description
Meeting Preparation	<i>"Lila, draft a 30-minute team meeting agenda."</i>	Agenda template
Reflection & Journaling	<i>"Lila, what should I reflect on after a tough week?"</i>	Reflection prompts
Email & Communication	<i>"Lila, write an email to announce our new service."</i>	Email draft
Feedback & Performance	<i>"Lila, help me create a feedback form for my team."</i>	Feedback template
Skill Development	<i>"Lila, recommend ways to improve my delegation skills."</i>	Action steps

Lila Interaction Best Practices

Best Practice	Why It Matters	Example
Be clear and specific	Yields more actionable, tailored responses	“Draft a plan for X”
Use open-ended questions	Encourages deeper insights and creative solutions	“How can I improve...?”
Ask for templates/resources	Saves time with ready-to-use materials	“Give me a template”
Follow up for detail	Refines and expands on initial responses	“Expand on that”
Save and organize responses	Builds a knowledge base for future reference	Use a shared folder

Lila Role Selector Table

Lila Role	Description	Example Prompt
Chief-of-Staff	Task execution, planning, communication support	<i>“Lila, organize my week for maximum productivity.”</i>
Reflection Guide	Prompts for self-awareness and growth	<i>“Lila, give me three reflection questions for today.”</i>
Executive Coach	Leadership advice, best practices, skill-building	<i>“Lila, help me develop my negotiation skills.”</i>
Research Assistant	Information gathering and summarization	<i>“Lila, summarize the latest trends in my industry.”</i>

Lila Output Types & How to Use Them

Output Type	Description	How to Use
Checklist	Step-by-step task or process list	Use for onboarding, project launches, etc.
Template	Ready-to-fill document or form	Copy, customize, and deploy in your business
Agenda	Structured meeting outline	Guide team meetings, reviews, or planning
Reflection Prompt	Questions for self or team reflection	Use for journaling or team check-ins
Email/Letter	Drafted communication	Copy, edit, and send to clients or team
Summary/Report	Condensed research or findings	Inform decisions, share with stakeholders

Lila Troubleshooting Table

Issue Encountered	Possible Cause	Solution/Prompt to Try
Generic or vague responses	Prompt too broad	Add more detail/context to your request
Output not in desired format	Did not specify format	<i>"Lila, provide this as a checklist/template/email."</i>
Missing information	Insufficient context provided	<i>"Lila, ask me follow-up questions before answering."</i>
Too much information	Request was too open-ended	<i>"Lila, summarize in three bullet points."</i>

Reflection & Journaling Prompts Table

Scenario	Example Reflection Prompt for Lila
After a challenging week	"Lila, what should I reflect on to learn from this week?"
Preparing for a big decision	"Lila, what questions should I ask myself before deciding?"
Team morale seems low	"Lila, how can I check in on my team's well-being?"
Celebrating a milestone	"Lila, suggest ways to recognize team achievements."

Lila Integration Opportunities Table

Integration Area	What Lila Can Do	Example Prompt
Calendar/Meetings	Schedule, prepare, and recap meetings	<i>"Lila, summarize last week's meeting notes."</i>
CRM/Customer Management	Draft outreach, follow-up, and customer comms	<i>"Lila, write a thank-you email for new clients."</i>
Project Management Tools	Create and update task lists, deadlines	<i>"Lila, generate a checklist for our next launch."</i>

These tables give small business owners immediate, actionable reference points for maximizing their use of Lila and MentalNotes.ai—covering prompts, best practices, roles, outputs, troubleshooting, and integration into daily business workflows.



BONUS SECTION: THE ENERGY LOOP - A DEEP DIVE FOR SMALL BUSINESS OWNERS

What Is the Energy Loop?

The Energy Loop is a practical, science-backed leadership framework designed to help small business owners manage and maximize the most critical resource in their business: human energy. It consists of three interconnected stages - Spark, Harness, and Release - that together create a continuous cycle for energizing yourself and your team, overcoming common business blockers, and sustaining long-term growth.

Why the Energy Loop Matters for Small Business

- ❖ **Addresses Common Blockers:** Small businesses often face time constraints, resource limitations, burnout, and misalignment. The Energy Loop provides a structured way to tackle these challenges head-on by focusing on motivation, alignment, and renewal.
- ❖ **Boosts Agility and Accountability:** By keeping energy flowing, small businesses can move quickly, adapt to change, and maintain high levels of accountability and engagement-key drivers of growth and resilience.
- ❖ **Sustains Performance:** The framework ensures that energy is not just sparked but also channeled and renewed, preventing burnout and keeping your team motivated through ups and downs.

The Three Stages of the Energy Loop

Stage	Purpose	How to Deploy in Your Business	Example Lila Prompt
Spark	Ignite motivation and purpose	Clarify vision, communicate clearly, celebrate wins	<i>"Lila, help me craft a vision statement for my team."</i>
Harness	Align and focus energy on shared goals	Define roles, resolve conflicts, create feedback loops	<i>"Lila, draft a RACI matrix for our new project."</i>
Release	Convert effort into results and renewal	Recognize achievements, build in rest, reflect	<i>"Lila, design a team reflection session agenda."</i>

HOW TO LEVERAGE THE ENERGY LOOP TO GROW AND SUSTAIN YOUR BUSINESS

Spark Energy: Ignite Motivation

- ❖ **Clarify Your Vision:** Regularly communicate the “why” behind your business. Make sure every team member knows how their work contributes to the bigger picture.
- ❖ **Communicate Consistently:** Use multiple channels-meetings, emails, one-on-ones-to keep everyone in the loop and inspired.
- ❖ **Celebrate Wins:** Recognize even small achievements to build momentum and reinforce progress.

Sample Lila Prompts:

- ❖ “Lila, help me write a weekly update to keep my team motivated.”
- ❖ “Lila, suggest ways to celebrate small wins remotely.”

Harness Energy: Align Effort

- ❖ **Define Roles Clearly:** Use tools like RACI matrices to eliminate confusion and ensure everyone knows their responsibilities.
- ❖ **Resolve Conflicts Quickly:** Address tensions or misalignments before they drain morale.
- ❖ **Establish Feedback Loops:** Hold regular check-ins to keep everyone aligned and course-correct as needed.

Sample Lila Prompts:

- ❖ “Lila, draft a feedback survey for my team.”
- ❖ “Lila, create a checklist for our weekly alignment meetings.”

Release Energy: Renew and Reflect

- ❖ **Recognize Contributions:** Publicly acknowledge team and individual successes.
- ❖ **Build in Rest:** Schedule downtime after big pushes to prevent burnout.
- ❖ **Facilitate Reflection:** Hold regular retrospectives to learn from successes and setbacks.

Sample Lila Prompts:

- ❖ “Lila, design a ‘pause week’ for my team after a major project.”
- ❖ “Lila, help me plan a reflection session to discuss our last quarter.”



Deploying the Energy Loop: Step-by-Step

- **Introduce the Framework:** Use a dedicated team meeting to explain the Energy Loop and its benefits. Invite input and questions.
- **Diagnose Energy Blockers:** With Lila's help, identify where energy is leaking-lack of vision, unclear roles, missed recognition, etc.
- **Run Your First Loop:** Pick a current project or challenge. Apply Spark (clarify purpose), Harness (align roles), Release (celebrate and reflect).
- **Embed in Routine:** Make the Energy Loop a regular part of your business rhythm-weekly checkins, monthly reflections, and ongoing feedback.
- **Scale Across Teams:** As you master the loop, apply it to cross-functional projects, remote teams, or during periods of change.

Practical Tools and Exercises

- ❖ **Vision Alignment Exercise:** Collaboratively craft a "North Star" statement with your team.
- ❖ **Feedback Mapping:** Have team members map out who they give and receive feedback from to ensure clarity.
- ❖ **Win Wall:** Set up a physical or digital space to celebrate daily or weekly wins.
- ❖ **Reflection Sessions:** Use Lila to facilitate structured retrospectives after major milestones.



LILA: YOUR ENERGY LOOP CO-PILOT

Lila is designed to help you apply the Energy Loop in real time:

- ❖ Ask for meeting agendas, reflection prompts, or conflict resolution strategies.
- ❖ Get templates for role clarity, feedback loops, and recognition programs.
- ❖ Use Lila to diagnose energy blockers and suggest actionable solutions tailored to your business.

Key Takeaways

- ❖ The Energy Loop is a repeatable, flexible system for managing motivation, alignment, and renewal.
- ❖ By embedding Spark, Harness, and Release into your business culture, you'll unlock hidden potential, prevent burnout, and drive sustainable growth.
- ❖ Lila is your on-demand partner for deploying the Energy Loop-use her expertise to keep your business energized and thriving.

Start today: Introduce the Energy Loop in your next team meeting and ask Lila for support at every stage. The results-greater engagement, resilience, and growth-will speak for themselves.

APPENDIX

Common Energy Blockers and Solutions

Energy Blocker	Description	Example Solution (Lila Prompt)
Lack of Vision or Purpose	Team unsure where they're headed or why it matters	<i>"Lila, help me clarify our team's vision."</i>
Poor Communication	Unclear or inconsistent messaging	<i>"Lila, draft a weekly update template for my team."</i>
Absence of Small Wins	No evidence of progress, leading to lost momentum	<i>"Lila, suggest ways to celebrate small wins."</i>
Unresolved Conflict	Disagreements or tensions stall progress	<i>"Lila, facilitate a conflict resolution session."</i>
Role Ambiguity/Conflict	Overlapping or unclear responsibilities	<i>"Lila, create a RACI matrix for our project."</i>
Lack of Timely Feedback	Teams lack guidance to adjust efforts	<i>"Lila, set up a feedback loop for my team."</i>
No Sense of Accomplishment	Efforts go unrecognized	<i>"Lila, design a recognition program."</i>
No Rest or Renewal	Continuous demands lead to burnout	<i>"Lila, recommend a rest and renewal schedule."</i>
Wasted Time/Resources	Inefficient processes drain focus	<i>"Lila, audit our workflows for efficiency."</i>

Types of Organizational Energy

Type of Energy	Description	Signs in the Workplace	Leadership Opportunity
Negative	Draining, destructive, marked by conflict/burnout	Cynicism, resistance, gossip, exhaustion	Transform into positive momentum
Latent	Untapped potential, disengagement, apathy	Quiet quitting, minimal effort, indifference	Activate through vision and inclusion
Positive	Constructive, collaborative, resilient	Creativity, risk-taking, growth, high morale	Amplify and sustain through recognition

The Three Stages of the Energy Loop

Stage	Purpose	Key Activities	Example Lila Prompt
Spark	Ignite motivation and purpose	Clarify vision, communicate, celebrate wins	<i>"Lila, help me craft a vision statement."</i>
Harness	Align and focus energy on shared goals	Define roles, resolve conflicts, feedback loops	<i>"Lila, draft a RACI matrix for our project."</i>
Release	Convert effort into results and renewal	Recognize, build in rest, reflect	<i>"Lila, design a reflection session agenda."</i>

Energy Loop Self-Assessment Checklist

Question	Yes	No	Action Step (if No)
Does my team have a clear, shared vision?			Clarify and communicate vision
Are roles and responsibilities well defined?			Create or update a RACI matrix
Do we celebrate small and large wins regularly?			Schedule recognition moments
Is feedback timely and constructive?			Set up regular feedback loops
Are rest and renewal built into our workflow?			Plan for downtime and reflection

Sample Feedback Loop Map

Team Member	Gives Feedback To	Receives Feedback From	Frequency
Alice	Bob, Carol	Manager, Bob	Weekly
Bob	Alice, Dave	Alice, Manager	Bi-weekly
Carol	Alice	Manager	Monthly

Energy Loop Meeting Agenda Template

Agenda Item	Duration	Purpose
Welcome & Purpose	5 min	Set the tone and explain meeting goals
Overview of the Energy Loop	10 min	Introduce Spark, Harness, Release
Identify Current Energy Blockers	10 min	Team discussion and blocker mapping
Brainstorm Solutions	15 min	Collaborative ideation for each loop stage
Next Steps & Closing	5 min	Summarize actions and encourage feedback

Win Wall Log (Celebrating Progress)

Date	Team Member	Win/Achievement	Recognized By	Notes
2025-05-16	Alice	Closed major client deal	Team	Shoutout in team meeting
2025-05-17	Bob	Automated invoice workflow	Manager	Added to Win Wall

Energy Audit Worksheet

Area	Current State (1-5)	Blocker Identified?	Action Plan
Vision/Purpose			
Communication			
Role Clarity			
Feedback Loops			
Recognition			
Rest/Renewal			

These tables make the Energy Loop actionable for small business owners, enabling quick diagnosis, planning, and improvement of team energy and performance. They also align with the practical, toolbased approach highlighted in the Energy Loop Handbook and similar best-practice guides[1][2].