AI THAT WORKS FOR YOUR BUSINESS

How one owner runs finance, sales, HR, contracts, and a website with AI that prepares the work and leaves the decisions with him.

Rick Pina | COO and CRO, Inspired Solutions, Inc. | Business owners session, September 2, 2026

AI is not the point. Work completed is.

A chatbot answers a question.

A workflow finishes a task.

A prompt lives in your head.

A workflow lives in your business.

A chat ends when you close the tab.

A workflow runs again next week.

YOU ASKED FOR THREE THINGS

The three habits behind everything you will see today

1

Give AI your material

Write one page about your business and hand it to AI every time. It stops guessing and starts working from your facts, your voice, and your rules.

SLIDE 5

2

Connect it to what you already pay for

QuickBooks, email, calendar, your CRM. AI reading live data does current work. AI working from memory does homework.

SLIDES 9 TO 12

3

Let it prepare. Never let it decide.

Drafts, comparisons, checklists, and reminders come from AI. Send, price, sign, hire, and commit stay with a person.

SLIDE 16

WHERE YOU ARE TODAY

The four levels of using AI

You type a question into ChatGPT, Claude, or Gemini. It answers from what you typed.

Chat

ONE ANSWER

MOST OWNERS ARE HERE

You give AI your company file, your documents, and your examples. It answers from your material.

Collaborate

CONSISTENT ANSWERS

AI reads live systems (email, calendar, QuickBooks, your CRM) on a schedule and reports back.

Delegate

CURRENT WORK

Scheduled agents fill boards, draft outreach, update the CRM, and hand you a decision queue.

Automate

A BUSINESS THAT RUNS

INSPIRED RUNS HERE

INSPIRED SOLUTIONS

The one-page company file

Who we are

Legal name, what we sell, who buys it, the three things we are known for.

Who we serve

Customer types, the top ten accounts, what they care about, what they complain about.

How we talk

Voice rules. Short sentences. No jargon. The words we never use. Two examples of emails we are proud of.

The people

Names, titles, who owns what, who signs what. AI stops asking who Karen is.

The rules

Never send. Never quote a price. Never promise a date. Always show the source. Always mark what you are not sure of.

Where things live

QuickBooks for money. The CRM for deals. The shared drive for contracts. Which file is the current one.

HOW TO USE IT

Save it as a Project in ChatGPT or Claude so it loads every time, or paste it at the top of any chat. Update it when something changes. Ten minutes to write, and every answer after that is about your business instead of a generic one.

REAL EXAMPLE FROM LAST MONTH

90 web pages rebuilt in six hours

- **The job:** move a ministry website from an old WordPress site to Wix. 3,600 blog posts plus 90 site pages.
- **The team:** an outsourced firm moved the 3,600 posts. Good work. Then they quoted an extra $2,000 to move the 90 pages.
- **The switch:** I gave AI the old site and access to the new one and asked it to rebuild every page.
- **The result:** about six hours later, all 90 pages were live on the new site. I reviewed them. I did not build them.

3,600
blog posts moved by the outsourced team

$2,000
quoted to move the remaining 90 pages

90
pages AI rebuilt from the old site

6 hrs
from the ask to the last page

THE LESSON

The quote was not wrong. The work simply stopped needing a team. Look at the next invoice for repetitive digital work (pages, listings, data entry, formatting) and ask AI to do the first ten before you sign.

LEVEL THREE IN REAL LIFE

Where the work lands: one text a day

Messages

6:30 AM

Prayer Update, Wed Sep 2
1. [Deal] for [customer], decision [date]
2. [Deal] for [customer], due [date]
3. [Deal] for [customer], award pending
If we win it all: $[total]

10:42 AM

AI deck v6 is ready: 34 slides, PDF and preview alongside. Opened in PowerPoint.

12:00 PM

Decision ping (3 ready)
1. Send [draft] to [customer]?
2. Approve [quote] at $[price]?
3. Reply to [partner] on [topic]?

6:30 AM, DAILY

The prayer list

AI reads our pipeline tracker, recomputes the totals, and writes one text: every deal we are praying over, the customer, the date, and what it adds up to. I forward it to leadership. That is our daily prayer list.

ALL DAY

Task pings

Every finished job reports to the same phone: a deck built, notes filed, a draft waiting. Leads with what was done. I never go looking for status.

7:00, 12:00, 6:30 PM

Decision pings

Ready items arrive as a numbered list three times a day. I answer by number: send, kill, later, done. No new approval thread per draft.

AI writes the text. I press forward.

WHAT STAYS WITH ME

Forwarding to leadership. Adding or removing a deal. Every answer in the decision queue. Nothing reaches my team, a customer, or a partner without my thumb on it.

THE MENU

Ten workflows that complete real work

1. **Finance and QuickBooks**
   A weekly owner briefing from your books
2. **Sales**
   Pre-meeting briefs, follow-ups, a current CRM
3. **Bids, quotes, and proposals**
   Requirements, compliance, drafts, a final check
4. **Human resources and hiring**
   Job posts, interviews, offers, onboarding
5. **NDAs and contract review**
   First-pass analysis before counsel
6. **Insurance and compliance**
   Contract requirements matched to coverage
7. **Meeting to execution**
   Decisions, owners, deadlines, follow-through
8. **Procedures and training**
   A walkthrough becomes a written process
9. **Customer service**
   Classified, drafted, escalated, tracked
10. **Marketing and content**
    One recording becomes a month of content

Your books become a weekly owner briefing

HOW IT USED TO GO

- You open QuickBooks when something feels wrong, not on a schedule.
- Past-due invoices get chased when cash gets tight.
- The accountant call is a list of questions you build the night before.
- Only you can explain where the money went.

HOW IT RUNS NOW

- Every Monday a one-page briefing is waiting: cash in, cash out, and why.
- Every invoice more than 30 days out is listed with a reminder already drafted.
- Margins and expenses are compared to last month, in plain language.
- Three questions for the accountant are written before you ask for them.

WHAT STAYS WITH YOU

Every reminder that goes out. Every spending decision. The accountant relationship. Checking a number before it leaves the building.

A number AI cannot see is a number AI does not write.

You never walk into a customer conversation cold

HOW IT USED TO GO

- You skim the last email in the car on the way to the meeting.
- Something you promised last time comes up and you do not remember it.
- The follow-up gets written three days later, if at all.
- The CRM is updated at the end of the quarter, from memory.

HOW IT RUNS NOW

- A one-page brief lands the morning of the call: history, open promises, three questions to ask.
- The follow-up email is drafted before you reach the parking lot.
- CRM notes and next steps are updated after the call, from your notes or the recording.
- Every Friday, a list of deals that have gone quiet.

WHAT STAYS WITH YOU

Pressing send on every email. Pricing, discounts, and commitments. The relationship itself. Deciding which deals to walk away from.

The change is not writing faster. It is never forgetting a promise.

Contract risk surfaces before you sign

HOW IT USED TO GO

- You read the first three pages and the signature block.
- The auto-renewal clause is discovered when the invoice arrives.
- Counsel bills an hour to find what a careful reader would have found.
- Nobody knows which version was signed.

HOW IT RUNS NOW

- AI reads every clause and returns a plain-language summary with section numbers.
- Every place the contract differs from your standard terms is listed, with the business risk.
- Renewal dates, notice periods, and obligations go on a calendar.
- Counsel gets a shorter, sharper call: here are the five clauses to look at.

WHAT STAYS WITH YOU

Whether to sign. Every negotiation position. Legal advice, from a licensed attorney. Any calendar entry that carries a penalty if missed.

AI finds the deviation. Counsel decides the risk. You decide the deal.

Every meeting ends with owners and deadlines

HOW IT USED TO GO

- The meeting ends and everyone remembers a different version.
- Commitments are made out loud and lost by Thursday.
- Notes, if they exist, live in one person's notebook.
- The same open item is discussed again next month.

HOW IT RUNS NOW

- Formatted notes with decisions, owners, and deadlines land within the hour.
- Follow-up emails are drafted before the next meeting starts.
- Tasks are created on the board with names and dates.
- An open-loop list carries every unfinished item week to week until someone closes it.

WHAT STAYS WITH YOU

Sending the follow-ups. Reassigning or cancelling a commitment. Any decision that changes scope, price, or a promise. Closing an item as done.

Meetings leak. The open-loop list is the bucket.

LEVEL FOUR, RUNNING TODAY AT INSPIRED SOLUTIONS

The AI executive operating system

1 MORNING

Owner briefing

Calendar, email, pipeline, cash, and deadlines on one page before 7 AM

2 ALL DAY

Email desk

Inbox sorted by urgency, replies drafted in my voice, nothing sent

3 DAILY

AR watch

Past-due invoices flagged, reminders drafted

4 DAILY

Deal watchdog

Every deal checked for stalls and next steps

5 DAILY

Bid scout

New bids scanned, scored, and posted to the board

6 3X A DAY

Decision queue

Ready items batched at 7:00, 12:00, and 6:30; I answer by number

7 CONTINUOUS

Open loops

Every commitment followed until it closes

8 EVENING

Daily wrap

The day logged, tasks updated, tomorrow prepared

AI prepares

Drafts, reads, compares, monitors, reminds

The owner decides

Send, price, sign, hire, commit, close

Nothing leaves unapproved

Draft-only by design, with an audit trail

LEVEL FOUR, EVERY FRIDAY AT 4:00 PM

The week closes itself

IT READS

The whole week, nothing sampled

- My calendar, every meeting Monday to Friday
- Every meeting note and full transcript
- Every email I received
- Every email I sent
- Every proposal and quote we submitted
- What we won, and what we lost and why

IT DOES

Before anything is written

- Counts what it read and prints the counts; a missing source is flagged INCOMPLETE on line one
- Separates decisions from discussion
- Computes the win rate by lane from our bid history
- Convenes my board of advisors: how am I doing?

IT DELIVERS

By Friday evening

- A draft recap email to our CEO and leadership team, in my voice
- A weekly close-out note in my vault, with the evidence
- One text to my phone with the digest
- Next week's calendar, already read

WHAT STAYS WITH ME

Reading the recap. Pressing send. Every decision the week surfaced. The board's counsel is input, never instruction.

Friday reads everything. Friday never sends.

LEVEL TWO, ON A SCHEDULE

My personal board of advisors

FAITH AND KINGDOM

T.D. Jakes, Bill Winston, Myles Munroe, Tony Evans, Creflo Dollar

FAITH-DRIVEN ENTREPRENEURS

David L. Steward (WWT founder, the anchor seat), Myron Golden, John Hope Bryant

FOUNDERS AND INNOVATORS

Elon Musk, Chamath Palihapitiya, Alex Hormozi, Byron Allen

GOVERNMENT CONTRACTING

Neil McDonnell, Eric Coffie, Dr. Kizzy Parks

Two rules

Never fabricate: apply a documented framework, never invent a quote. Never flatter: every review must name the sharpest case against my current course.

Three cadences

Daily: one rotating advisor weighs in on the day. Friday: five to seven seats answer how am I doing, against the real week. Any decision: convene a relevant three to five.

What comes back

Where they agree. Where they genuinely disagree, and why. The single strongest argument that I am wrong. One recommended next action.

Each seat is a profile built from what that person has actually taught. A thinking tool, not a seance. Their counsel is input. I decide.

CONTROL BEFORE SCALE

Five guardrails that make the rest safe

1

Use trusted sources

AI works only from your systems, your documents, and sources you would cite yourself.

2

Protect sensitive data

Business-grade tools with data controls. Customer, employee, and financial data never go into a free consumer chat.

3

Keep human approvals

Send, pay, sign, hire, price, and commit stay with a person. AI drafts; you approve.

4

Keep an audit trail

Every draft, source, and decision is logged so you can show what AI did and why.

5

Start draft-only

Start where a mistake costs a minute of review, not a customer. Earn the next step.

Guardrails are what let you connect AI to real systems. Without them, stay on the chat step.

START SMALL, PROVE VALUE

How to choose your first workflow

Is it repeatable?

It happens every week, the same way. One-time projects do not build a habit.

Is the information already in a system?

QuickBooks, email, your CRM, a shared folder. If it lives in someone's head, start with procedures first.

Is the output easy to check?

You can read the result in five minutes and know if it is right.

Is a mistake cheap?

A bad draft costs a minute of review. Start there, not with customer-facing or money-moving work.

1. Pick the workflow with four yes answers
2. Run it draft-only for 30 days
3. Measure one number: hours saved or days faster
4. Add the next workflow

YOUR FIRST 30 DAYS

A four-week plan you can start Monday

WEEK 1

Write the page and pick the job

- Write your one-page company file (slide 5).
- Score three candidate workflows with the four questions.
- Pick one. Meeting notes or the finance briefing are the safest first picks.

WEEK 2

Run it every day, draft-only

- Run the same prompt daily with your real material.
- Fix the prompt when the output is wrong. Keep the version that works.
- Nothing AI produces goes out without a person reading it.

WEEK 3

Measure one number

- Hours saved, days faster, or items that no longer slip.
- Write the number down. One number, not a dashboard.
- Notice what you stopped doing by hand.

WEEK 4

Decide and add

- Keep it, fix it, or drop it.
- If it works, connect it to the live system instead of pasting.
- Pick workflow two and repeat.

INSPIRED SOLUTIONS

Start with one workflow.
Measure the result.
Add the next.

We are focused on making the world a better place.

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8(a) | **SDVOSB** | **EDWOSB** | **WOSB** | **MBE** | **WBE**

BACKUP SLIDES

The presentation ends here. Everything after this page is for your review later.

- One more real example: an advisory team built in a folder for another business
- Six more workflow stories: hiring, insurance, bids, procedures, customer service, marketing
- The five questions we ask before chasing any bid
- Ten how-to slides, one per workflow, each with a prompt you can paste tomorrow

REAL EXAMPLE FROM A COACHING CALL

An advisory team in a folder, built in one hour

- **The situation:** a two-founder leadership firm wanted to turn its frameworks into a sellable program. Big-firm consultants were out of reach.
- **The build:** a folder with a one-page company file and six AI consultants: strategy, federal, state and local, CEO brand, talent, and revenue operations.
- **The process:** each consultant read the founders' files alone, then they compared notes, then one lead wrote the assessment.
- **The result:** five gaps on the table inside the hour, and a folder the founders reuse for every decision after.

6
AI consultants with distinct expertise

3
rounds: read alone, compare, synthesize

1 hr
from empty folder to written assessment

5
gaps identified for the founders to work

THE LESSON

You do not need one all-knowing assistant. You need a bench. Name the experts you cannot afford, describe each one in a paragraph, and make them argue over your real documents before you decide.

Hiring is standardized without surrendering judgment

HOW IT USED TO GO

- The job posting is the one from 2019 with the title changed.
- Every interviewer asks different questions and scores from memory.
- The offer letter and onboarding plan get built the night before the start date.
- Reviews are written in one sitting, from memory.

HOW IT RUNS NOW

- An updated posting, an interview guide, and a scorecard come back in one pass.
- Every candidate gets the same six questions and the same 1 to 5 scale.
- The offer package and a 30-day onboarding plan are drafted when you say yes.
- Review drafts pull from the year's notes; the manager edits and delivers.

WHAT STAYS WITH YOU

The hiring decision, every time. Pay and benefits. Any conversation about performance. Legal review of policy changes.

Consistency is fairness, and fairness is defensible.

Insurance requirements matched to your coverage

HOW IT USED TO GO

- The insurance section of the contract gets initialed without being read.
- Nobody reads the endorsements until there is a claim.
- Certificates are requested the day the customer asks for them.
- A policy lapses and the customer tells you.

HOW IT RUNS NOW

- AI pulls every required coverage, limit, and endorsement out of the contract.
- It lays them next to what you actually carry and marks each gap.
- The questions for your broker are written before you call.
- Renewal and certificate dates sit on one calendar.

WHAT STAYS WITH YOU

Coverage decisions and purchases. Confirmation of coverage, by a licensed insurance professional. What gets promised to a customer. Broker and carrier relationships.

AI finds the gap. Your broker closes it.

Every bid is controlled from intake to submission

HOW IT USED TO GO

- Someone reads the 80-page solicitation once and highlights it.
- A requirement on page 61 gets missed because a human was tired at 11 PM.
- Pricing and writing happen in parallel and meet for the first time at the end.
- A form is missing and nobody finds out until the debrief.

HOW IT RUNS NOW

- AI extracts every requirement, deadline, and form into a matrix the first hour.
- A bid or no-bid summary comes back before anyone spends a week writing.
- Specialist agents draft, edit, and check the response against the matrix.
- A final checklist runs against the actual files before anything leaves.

WHAT STAYS WITH YOU

Bid or no-bid. The price. Every claim about your company. The signature and the submission.

Nothing gets missed because the reader never gets tired.

Five questions before we chase any bid

1	**How many others will bid?**	AI pulls the offer count on comparable past awards and the notice type.	**Open competition with more than 30 expected bidders: no, unless I say strategic**
2	**What does the market pay, and is that above our floor?**	AI pulls the winning price band on comparable awards and lays it next to our cost floor.	**Market clears below our floor: no, unless strategic**
3	**What lane are we in?**	Sole source, set-aside, contract vehicle, or partner-referred are favored. Open must clear questions 1 and 2.	**Written on the deal record, line one**
4	**Is a partner bringing it, and does any partner we need pass the paper test?**	A partner referral is our strongest win signal. A partner we depend on must show size status in writing, clearance paper, rates, and verified certifications first.	**Partner fails the paper test: no, until it passes**
5	**Are we allowed, and what is the one thing that kills it?**	Size, fit, certifications, our edge, and the single risk that ends it (key personnel, clearance, subcontracting limits).	**Go or no-go, one line of reasoning, and a predicted win probability, written down**

The gate recommends. The owner decides. A no-go is never silent: it lands on my phone as one line, and one word (strategic) overrides it.

Tribal knowledge becomes written procedures

HOW IT USED TO GO

- The process lives in your best person's head.
- New hires learn by shadowing for a month.
- Every person does it a little differently.
- When that person is out, the work stops.

HOW IT RUNS NOW

- A 15-minute screen recording becomes a step-by-step procedure the same afternoon.
- Prerequisites, exceptions, and a quality check at each handoff are written in.
- A one-page checklist for the floor and a five-question quiz for new hires come with it.
- Steps that only one person knows are flagged, so you can fix that on purpose.

WHAT STAYS WITH YOU

Approving the procedure as the standard. Deciding what quality means. Training and certifying people. Changing the process.

What happens to your business if your best person is out for a month?

Faster answers, with people on the exceptions

HOW IT USED TO GO

- Every message waits for the one person who knows the answer.
- Urgent and routine sit in the same inbox in the order they arrived.
- The same question gets answered from scratch fifty times a year.
- The angry customer waits as long as the shipping question.

HOW IT RUNS NOW

- Every incoming message is classified by subject and urgency, urgent on top.
- A reply is drafted from your approved policies, queued for a person to read and send.
- Refunds, complaints, and anything legal or safety-related are flagged for you personally.
- Every week, a list of questions your knowledge base could not answer.

WHAT STAYS WITH YOU

Refunds, credits, and exceptions. Any commitment to a customer. Upset customers and sensitive issues. Approving what goes into the knowledge base.

Start draft-only. The weekly list of unanswerable questions is how it gets better.

One recording becomes a month of content

HOW IT USED TO GO

- Content gets written when there is a gap in the day, so it does not get written.
- The posts that do go out sound like everyone else's AI.
- One good talk or customer story is used once and forgotten.
- Claims drift: a rounded number, a customer named without permission.

HOW IT RUNS NOW

- Record one 20-minute talk. AI pulls the ideas and quotes and writes each format in your voice.
- Five posts, one customer email, one article, an FAQ, and a video script from one source.
- Every claim stays tied to the transcript; nothing gets invented.
- A publishing schedule is built and you approve each piece.

WHAT STAYS WITH YOU

Approving every piece before it publishes. Any claim about results, customers, or numbers. The voice itself. What the company stands for.

Feed it your real voice and only verified claims. That is the whole fix for sounding fake.

How the weekly owner briefing runs

CONNECT
What AI reads

- QuickBooks Online (read only)
- Open invoices and bills
- Bank and card transactions
- Last month, for comparison

AI DOES
The work it completes

- Explains cash movement in plain language
- Flags accounts receivable past 30 days
- Compares margins and expense trends
- Writes the questions for your accountant

YOU RECEIVE
What lands on your desk

- A one-page briefing every Monday
- A past-due list with draft reminders
- Three questions for the accountant
- A flag on anything that moved more than usual

TRY THIS TOMORROW, WORD FOR WORD

Connect to my QuickBooks account. Summarize cash in and cash out for the last 7 days, list every invoice more than 30 days past due with the customer name and amount, and write three questions I should ask my accountant this week. Use only figures you can see in the data.

How the pre-meeting brief runs

CONNECT
What AI reads

- Your CRM (HubSpot, Monday.com, or a spreadsheet)
- Email threads with the customer
- Calendar
- Public information on the company and contact

AI DOES
The work it completes

- Researches the prospect and the contact
- Summarizes past conversations and open issues
- Drafts the follow-up in your voice
- Flags deals with no activity in 14 days

YOU RECEIVE
What lands on your desk

- A one-page brief the morning of the call
- A follow-up draft ready for your edits
- CRM notes updated after the call
- A weekly list of stalled deals

TRY THIS TOMORROW, WORD FOR WORD

I meet with [customer] at 2 PM tomorrow. Read our email history and my CRM notes, research the company and the contact, summarize the open issues and anything we promised them, and give me a one-page brief with three questions to ask and one recommended next step.

How the bid workflow runs

CONNECT
What AI reads

- The RFP, RFQ, or grant announcement
- Amendments and questions and answers
- Your past proposals and past performance
- Vendor quotes and pricing inputs

AI DOES
The work it completes

- Extracts every requirement and deadline
- Builds a compliance matrix
- Drafts each section in your format
- Checks the package for missing items

YOU RECEIVE
What lands on your desk

- A requirements and compliance matrix
- A bid or no-bid summary
- A draft response in your format
- A final checklist before submission

TRY THIS TOMORROW, WORD FOR WORD

Read this RFP and its amendments. List every requirement with its section number, build a compliance matrix with a column for where we will answer it, list every deadline and form, and tell me what we are missing to respond.

How the hiring workflow runs

CONNECT
What AI reads

- Your current job descriptions
- Employee handbook and policies
- Interview notes and scorecards
- Offer letter and onboarding templates

AI DOES
The work it completes

- Writes job descriptions and postings
- Builds interview questions and scorecards
- Prepares offers and onboarding plans
- Drafts reviews from the year's notes

YOU RECEIVE
What lands on your desk

- A posting ready for the job board
- An interview guide every interviewer uses
- An offer package and a 30-day plan
- A review draft the manager edits

TRY THIS TOMORROW, WORD FOR WORD

Here is our current job description for [role] and our handbook. Write an updated posting, a structured interview guide with six questions and a 1 to 5 scorecard for each, and a two-week onboarding plan. Mark anything an employment attorney should review.

How the contract review runs

CONNECT
What AI reads

- The agreement under review
- Your standard NDA and preferred terms
- NDA terms: mutual or one-way, definitions, term, return of information
- Contract terms: scope, payment, renewal, indemnity, liability, IP

AI DOES
The work it completes

- Summarizes the agreement in plain language
- Builds a clause inventory with citations
- Lists every deviation and its business risk
- Builds an obligations calendar

YOU RECEIVE
What lands on your desk

- Plain-language summary
- Deviation list with section numbers
- Obligations and renewal calendar
- Questions for licensed counsel

TRY THIS TOMORROW, WORD FOR WORD

Review this NDA against our standard terms. Give me a plain-language summary, a clause-by-clause inventory with section numbers, every place it differs from our standard, the business risk of each difference, a calendar of dates and obligations, and the questions I should bring to our attorney.

How the coverage match runs

CONNECT
What AI reads

- Insurance clauses in each contract
- Policy summaries and declarations
- Certificates and endorsements
- Policy expiration dates

AI DOES
The work it completes

- Extracts required coverage and limits
- Compares them to policies and certificates
- Checks additional insured and waiver wording
- Flags exclusions and expiring policies

YOU RECEIVE
What lands on your desk

- A coverage matrix by policy type
- A gap list by contract
- Questions for your broker
- A renewal and certificate calendar

TRY THIS TOMORROW, WORD FOR WORD

Read the insurance section of this contract and our policy summaries and certificates. Build a table of every required coverage, limit, and endorsement, show what we carry next to each one, mark every gap, and write the questions for our broker.

How the meeting workflow runs

CONNECT
What AI reads

- Meeting recordings or transcripts (Otter, Teams, Zoom)
- Calendar
- Your task or project system
- Last week's open items

AI DOES
The work it completes

- Separates decisions from discussion
- Extracts commitments, owners, and deadlines
- Drafts the follow-up messages
- Tracks unresolved items until they close

YOU RECEIVE
What lands on your desk

- Formatted notes within the hour
- Follow-up emails ready to send
- Tasks created with owners and dates
- An open-loop list that carries week to week

TRY THIS TOMORROW, WORD FOR WORD

Here is the transcript from today's meeting. List every decision made, every commitment with the owner and due date, and every question left open. Draft a follow-up email to the attendees and a task list I can paste into our project board.

How the procedure workflow runs

CONNECT
What AI reads

- A screen recording or employee walkthrough
- Existing checklists and forms
- The tools the process touches
- Known exceptions and failure points

AI DOES
The work it completes

- Writes step-by-step procedures
- Identifies prerequisites and exceptions
- Adds quality checks at each handoff
- Creates a training guide and quiz

YOU RECEIVE
What lands on your desk

- A documented standard operating procedure
- A one-page checklist for the floor
- A training guide with a short quiz
- A list of exceptions and who handles them

TRY THIS TOMORROW, WORD FOR WORD

Here is a 15-minute recording of how we onboard a new customer. Write the step-by-step procedure, list what must be true before each step starts, add a quality check at each handoff, and write a five-question quiz for new hires.

How the service workflow runs

CONNECT

What AI reads

- Incoming requests: email, forms, chat
- Your approved knowledge base and policies
- Order or account history
- Past resolved tickets

AI DOES

The work it completes

- Classifies each request by subject and urgency
- Searches the approved knowledge base
- Drafts a response
- Flags sensitive issues for a person

YOU RECEIVE

What lands on your desk

- Drafted replies queued for review
- A prioritized list with urgent items on top
- A weekly list of unanswerable questions
- Fewer repeat questions over time

TRY THIS TOMORROW, WORD FOR WORD

Here are today's customer messages and our support policies. Sort them by urgency, draft a reply for each one using only our approved policies, and flag any message about a refund, a complaint, or a legal or safety concern for me to handle personally.

How the content workflow runs

CONNECT
What AI reads

- One source: a talk, video, article, or interview
- Your voice guide and three examples of your writing
- Verified facts and claims about your company
- Your content calendar

AI DOES
The work it completes

- Pulls the key ideas and quotes from the source
- Writes each format in your voice
- Keeps every claim tied to the source
- Builds a publishing schedule

YOU RECEIVE
What lands on your desk

- Social posts, email content, and articles
- FAQ and video scripts
- Website copy and sales collateral
- A month of content from one hour of you

TRY THIS TOMORROW, WORD FOR WORD

Here is the transcript of my 20-minute talk and three examples of how I write. Create five LinkedIn posts, one email to customers, one article, an FAQ, and a 60-second video script. Use only claims that appear in the transcript and keep my voice.