

The Next Step

Chat / Claude

the old way

Ask, get an answer

You carry the context, every time

Every chat starts from scratch

Work / Code

puts AI to work

Desktop app, signed into your business

Connects to email, calendar, CRM

Carries out multi-step work



Expertise in **YOUR business** beats expertise in AI.

**"If we 10x our leads,
what breaks?"**

01 Map your business

02 Find the constraints

03 **THEN get more leads**

Understand Your Agent



- A brilliant, workaholic child
- Treat like any new employee with zero judgement and appropriate access
- Knows everything. Understands nothing about your business until you teach it.
- Check its work. Every time.

Set Non-Negotiable Rules

Back to app

Search settings...

Personal

General

Profile

Appearance

Voice

Configuration

Personalization

Pets

Keyboard shortcuts

Usage & billing

Account

Integrations

Appshots

Plugins

Browser

Computer use

Coding

Hooks

Connections

Git

Environments

Worktrees

Archived

Personalization

ⓘ Personality settings are not supported by every model. Codex's tone can be customized in Custom instructions.

Personality

Choose a default tone for ChatGPT responses

Friendly

Custom instructions

Give ChatGPT extra instructions and context for all chats on this host. [Learn more](#)

Security is the highest priority.

Be extremely concise. Prefer bullets over prose when appropriate.

Prioritize accuracy over agreement, and disagree when the evidence warrants it.

Memory

Configure how ChatGPT collects, retains, and consolidates memories. [Learn more](#)

Enable memories

Generate new memories from chats and bring them into new chats

Chronicle research preview

Augment memories with screen context so ChatGPT can help with anything you're working on. [Learn more](#)

Allow memory generation from tool-assisted chats

Generate memories from chats that used MCP tools or web search

Reset memories

Delete all ChatGPT memories

Reset

Written once. Applies to every conversation.

Set Non-Negotiable Rules

Custom instructions

[Save](#)

Give ChatGPT extra instructions and context for all chats on this host. [Learn more](#)

Security is the highest priority.

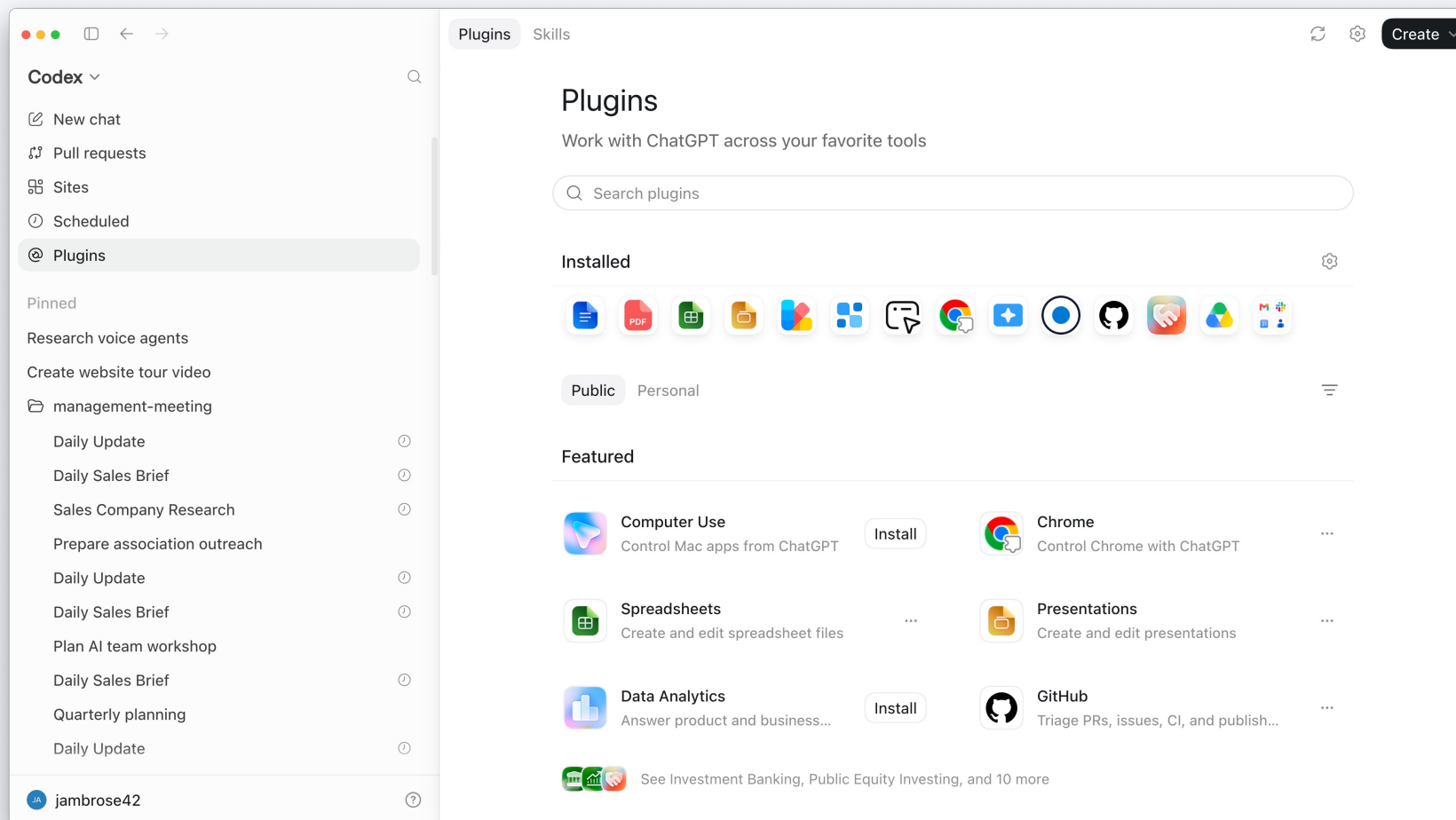
Be extremely concise. Prefer bullets over prose when appropriate.

Prioritize accuracy over agreement, and disagree when the evidence warrants it.

Never send an external email or message without my explicit approval

Written once. Applies to every conversation.

Get Connected



Connectors and plugins give your agent hands: email, calendar, files, CRM.

Don't Overthink It

More thinking is slower, and time is money (tokens).

CHATGPT	CLAUDE	WHEN TO USE
Luna / Light	Sonnet / Low	Just do it
Terra / Medium	Opus / High	Consider first, then do
Sol / High	Fable / Extra	Let's make a plan
Sol / Ultra	Fable / Ultracode	Just... don't.



The Lightning Round

35 real workflows. Each one is a prompt, its output, and a stop sign.

● **Automation**

runs on a schedule. Want it to react to email? Schedule it to check.

● **On-demand**

you run it when you need it

⊖ **YOU REVIEW** The red checkpoint is you. It never comes out of the workflow.

Map Your Company Knowledge

● **On-demand** · one project, then it compounds

PROMPT

Find and scan all documentation.
Create a logical folder structure.
Create indexes with a summary for each area.
Link to original documents.
Package it as a reusable skill, with privacy guidelines.

Files

Drive



KNOWLEDGE MAP

Company Knowledge Map

214 documents indexed into 9 areas.

Areas

1. **Services and pricing** · 32 docs · summarized
2. **Proposals and contracts** · 58 docs · summarized
3. **Job records and closeouts** · 71 docs · summarized
4. - 6 more areas, all linked to originals

Ready to use

- Ask a question, get an answer with its source
- Saved as a reusable skill with privacy guidelines



YOU REVIEW You confirm what counts as the source of truth.



Daily Sales Review

● **Automation** · runs weekdays, 7:00 AM

PROMPT

Read yesterday's CRM activity.
Check today's calendar.
Flag deals going cold.
Create draft follow-up emails.

CRM

Calendar

Email

↑

SALES REVIEW

Sales Review · Tuesday, July 22

Going cold

- **Baypoint HVAC** · quiet 16 days · nudge drafted
- **Ritter Glass** · quiet 21 days · nudge drafted

Drafts ready (5)

1. **Dana Whitfield** · Gulf Coast Interiors · "Following up on the Phase 2 quote"
2. **Rob Feld** · Manatee Paving · "Scheduling the site walk"
3. **Baypoint HVAC** and **Ritter Glass** re-connect notes
4. Thank-you to **Pam Ritter** for the referral

Today

- 10:00 AM · Coastal Mechanical walkthrough · prep note attached
- No proposals awaiting signature

⊖ **YOU REVIEW** Drafts wait for your approval. Nothing sends itself.



Daily Newsletter Report

● **Automation** · runs daily, 6:30 AM

PROMPT

Read my email newsletters from last 24 hours.
Pull items tied to my market and clients.
Drop the noise.
Write a one-page digest.
Draft social media posts.

Email

⬆

MORNING DIGEST

Morning Digest · July 22

Worth your time

- **AI agents that book their own follow-ups** — early case studies from shops under 50 people (AI for Operators)
- **Microsoft Copilot pricing change** hits small teams August 1 (SMB Tech Weekly)

Dropped

- 14 items: vendor promos, webinars, duplicates

Post drafts (2)

1. What "AI that books follow-ups" looks like for a 10-person shop
2. Copilot price change: what to check before Aug 1

⊖

YOU REVIEW Read the digest. Edit the drafts. You schedule what publishes.



Build a Lead List

● **On-demand** · run it when you need it

PROMPT

Do deep research and generate a cold call sheet.
Search local association directories.
Search the web for ICP companies.
Identify leadership team.
Check if they are already in CRM.
Find phone, email, hiring signals, recent news.
Write call notes per company.
Use subagents.

Web Search

CRM

↑



CALL SHEET

Lead List · Lakewood Ranch Subcontractors
38 owner-led commercial firms. Top of the sheet:

1.

Suncoast Drywall · Mike Terry · (941) 555-0184
Hiring two crews. Mention the Waterside build.

1.

Ritter Glass · Pam Ritter · (941) 555-0139
New showroom permit. Ask about install backlog.

1.

Manatee Paving · Rob Feld · (941) 555-0112
Bidding the UTC expansion. Referral path via LWRBA.

Every row includes

- Phone, email, and website
- A reason to call, with its source
- Guesses labeled as guesses

⊖

YOU REVIEW You spot-check before the CRM import.



Meeting Transcript → Proposal

● **On-demand** · run it after the discovery call

PROMPT

Meeting transcript attached.
Pull needs, budget, and timeline.
Match them to services (company knowledge).
Draft scope and pricing.
Format it in my template.

Attachment

CRM

Docs



PROPOSAL DRAFT

Proposal Draft · Coastal Mechanical

Pulled from the call

- Scope: office build-out, 8,400 sq ft
- Budget signal: \$120-140K · timeline: October

The draft includes

1. Scope of work matched to your services
2. Pricing from your rate sheet
3. Your standard terms, in your template

Flagged for you

- Permit responsibility was ambiguous on the call



YOU REVIEW Fix the numbers. Pricing and promises stay yours.



Process Change Orders

● **Automation** · checks the inbox hourly

P R O M P T

Find change request emails.
Extract scope, cost, and dates.
Compare against the contract.
Flag anything unusual.
Log a clean summary in #change-orders Slack channel.

EmailDocsSlackCRM

↑

C O S U M M A R Y

Change Order Summary · CO-014

- **Project:** Waterside build-out
- **Amount:** \$18,450 · **Schedule:** +9 days

Flags

- Overlaps scope already in contract section 4
- Unit price 22% above the contract rate
- Schedule impact lands on the inspection week

Logged

- Summary filed to the project record with the source PDF

Notified

- Posted update to #change-orders channel in Slack

 **YOU REVIEW** You approve the money. Dollar decisions never leave your desk.



Wake Up Cold Contacts

● **On-demand** • run it when the pipeline is thin

PROMPT

Scan CRM, and email history.
Who haven't I talked to in six months?
Check their website, PR and socials.
Draft a natural re-connect note for each.

CRM

Email

Web Search



RE-CONNECT DRAFTS

Gone Quiet • Six Months or More

11 contacts found. Drafts reference the last real conversation:

1. **Dana Whitfield** • Gulf Coast Interiors • last talked March 3
Draft mentions her showroom expansion, from their news page.
1. **Rob Feld** • Manatee Paving • last talked January 12
Draft congratulates the UTC award. No sales ask.
1. **Pam Ritter** • Ritter Glass • last talked February 20
Draft follows up on the install backlog she mentioned.

Also

- 8 more drafts, each with the source of its opener



YOU REVIEW You know the relationships. Adjust and send.





Website → Animated Video

● **On-demand** · run with a creative idea

PROMPT

Use remotion to create a video tour of our new facility.
Create a script from our latest press release.
Use eleven-labs to create a voice over from the script.
Render a shareable video.

Web

Remotion

ElevenLabs



VIDEO DRAFT

Facility Tour - Draft 1

- **Download:** [facility-tour.mp4](#)
- **Length:** 48 seconds · 1080p
- **Script:** from your press release, 4 lines trimmed
- **Voice-over:** your approved voice, natural pacing

Scenes

1. Aerial open with the logo
2. Shop floor, crew at work
3. Client wall and the finish reel
4. Call to action: phone and website

Next

- Say what to change; re-render takes minutes



YOU REVIEW Watch it before it ships anywhere.



Stale-Deal Sweep

● **Automation** · runs Fridays, 3:00 PM

P R O M P T

Scan every open deal.
Flag 14 days of silence.
Recall where each one stalled.
Draft a personalized nudge.

CRMEmail

↑

S W E E P R E P O R T

Friday Sweep · 3 Deals Quiet

- Baypoint HVAC** · \$42K · stalled at the quote · nudge drafted
- Gulf Coast Interiors** · \$18K · waiting on drawings · check-in drafted
- Coastal Mechanical** · \$67K · dark since the site visit · suggest a call, not an email

Recommendation

- Send two, call one, close none this week

 **YOU REVIEW** Send, hold, or close it out. Your call.



Pre-Meeting Brief

● **Automation** · runs nightly on calendar meetings

PROMPT

Create a prep sheet for today's meeting.
Identify attendees, their companies, and roles.
Pull email and CRM history.
Gather recent news and context.
Produce a one-page brief.

Calendar

Email

Web



MEETING BRIEF

Meeting Brief · Coastal Mechanical

Tomorrow 10:00 AM · operations manager, plus their estimator.

The company

- Commercial HVAC, about 40 crew, expanding south
- New Venice service center permitted last month

Your history

- Two April emails on service pricing; no meeting yet
- They opened your last proposal three times

Openers

- Ask about the Venice expansion and who runs it

Next step

- Want me to email this to you so you have it handy?



YOU REVIEW Two-minute read in the car. Add your own questions.





Post-Meeting CRM Update

● **On-demand** • run it with your voice note

PROMPT

"Just finished my site visit..."
Create next-step tasks.
Update the deal stage.
Draft the follow-up email.
Send my notes to the operations Slack channel.

Voice

CRM

Email

Slack



CRM UPDATE

CRM Updated • Coastal Mechanical

- **Notes** filed from your 90-second voice memo
- **Stage** moved: Site Visit to Proposal

Tasks created

1. Send drawings • Friday
2. Site walk with their estimator • July 29

Follow-up draft

- "Good walking the site today. Two things we discussed..."
- Waiting in your outbox, unsent

Notification

- Posted your notes to **#operations** Slack channel



YOU REVIEW Correct anything it misheard. Then send the follow-up.





Trade Show Card Dump

● **On-demand** · snap pics of cards and attach

P R O M P T

Read every card and note in these photos.
Capture all contact details.
Create the CRM entries.
Draft personal follow-ups.

Photos

CRM

Email

↑

C O N T A C T L I S T

Event Contacts · 14 Cards Read

1. **Pam Ritter** · Ritter Glass · your note: "install backlog"
Draft opens with the backlog conversation.

1. **Mike Terry** · Suncoast Drywall · your note: "wants the AI recap"
Draft attaches the recap and offers coffee.

1. - 12 more, enriched and staged for the CRM

Every draft

• References your handwritten note from the event

• Waits unsent until you approve

⊖

YOU REVIEW Match the note to the face. Add the detail only you remember.



Closed-Won Referral Engine

● **Automation** · checks daily for closed-won deals

PROMPT

Draft a thank-you note Gulf Coast.
Draft the review request.
Draft the referral ask.
Space emails on a schedule.

CRMEmail

↑

SCHEDULED ASKS

Closed Won · Gulf Coast Interiors
Three drafts, spaced so none feels like a form letter:

- Today** · thank-you note to Dana, mentions the opening date save
- Day 7** · Google review request, one link, no pressure
- Day 21** · referral ask naming the two peers she mentioned

Status

- All three waiting for your approval before scheduling

⊖ **YOU REVIEW** Adjust the wording. Confirm each send date.



Lost-Deal Autopsy

● **Automation** · runs quarterly

PROMPT

Pull every lost deal from last quarter.
Read the notes and emails.
Find the patterns.
Write the findings report.

CRM

Email

↑

QUARTERLY REPORT

Lost Deals - Q2 Report

14 losses reviewed, notes and email threads included.

Patterns

- 8 of 14 went quiet after the quote; no follow-up logged
- 4 lost on lead time, not price
- 2 were bad fits that cost estimating hours anyway

The one change

- A quote follow-up automation would have touched 8 of these deals

⊖ **YOU REVIEW** You decide what changes in the sales process.



Same-Hour Quote

● Automation · checks the inbox hourly

PROMPT

Find requests for quotes in sales inbox.
Read what they asked for.
Apply my price sheet.
Draft the quote using the template.
Note anything nonstandard.

EmailSheetsDocs

↑

QUOTE DRAFT

Quote Draft · Ritter Glass

- **Request:** storefront glass replacement, 6 panels
- **From your price sheet:** \$9,840 installed
- **Formatted** in your quote template, ready to attach

Flagged

- Tempered spec is unclear in their email
- One clarifying question drafted to send with the quote

⊖

YOU REVIEW Check the numbers. Margins and exceptions are yours alone.



One Story, Five Assets

● **On-demand** · run it when something good happens

PROMPT

We just shipped a rush job and client is very happy.
Interview me for details, one question at a time.
Write the LinkedIn post.
Write the email and blog versions.
Draft a short video script.

Docs



CONTENT PACK

Content Pack · The Rush-Job Save

From your two sentences, plus four interview questions:

1. **LinkedIn post** · 140 words, your voice
2. **Newsletter blurb** · 60 words
3. **Blog draft** · 500 words with the timeline
4. **Video script** · 45 seconds, three beats
5. **FAQ entry** · "Can you handle rush work?"

Facts preserved

- Dates, numbers, and the client's words marked for permission



YOU REVIEW Cut anything you wouldn't say out loud.





Review Responder

● **Automation** · check reviews daily

PROMPT

Read my Google Business reviews.
Check for existing reply.
Draft a reply in my voice.
Reply should mirror review.
Queue it for my OK.

Google Business API



REPLY DRAFT

Review Reply - Draft

- **New review:** 2 stars · "crew left early on Friday and nobody called"
- **History:** first job with this customer, closed out June 30

The draft

- Owns the missed call without excuses
- Offers the fix and a direct number
- No discounting, no arguing the facts

Status

- Queued. Publishes only when you approve.



YOU REVIEW Angry reviews get your personal read before anything posts.



Case Study Machine

● **On-demand** • run it when a project wraps

PROMPT

Pull the before and after.
Draft the story arc.
Work in the customer's words.
Format web and PDF versions.

Files

Docs

↑

CASE STUDY

Case Study Draft - Waterside Build-Out

The draft includes

- Before and after, with the three-week schedule save
- Dana's quote, pulled from her thank-you email
- Numbers from the closeout package
- Web page and PDF versions in your template

Needs before publish

- Customer sign-off on the numbers and the quote

⊖ **YOU REVIEW** Verify every claim. Sign-off before it publishes.



Newsletter From Your Work

Automation · runs monthly, last Friday

PROMPT

Review my month's wins and events.
Pick three things worth sharing.
Draft it in my voice.
Add one useful tip.

EmailCalendar

↑

NEWSLETTER DRAFT

July Newsletter - Draft

Three items picked from your month

- Waterside wrap-up** · with the closeout photo
- New hire welcome** · Alex joins as project coordinator
- One useful tip** · locking material prices before the fall run-up

Voice check

- Built from your sent mail and past issues, not a template

⊖

YOU REVIEW Ten minutes of polish, then you schedule it.



Event Promo Kit

● **On-demand** · run it when you book an event

PROMPT

Write the announcement post.
Draft the email invites.
Build the reminder sequence.
Prep the day-after follow-up.

Calendar

Mailchimp

Assets

↑

PROMO KIT

Promo Kit - Open House, August 14

- 1. Announcement post** · ready
- 2. Email invite** · ready, merge fields checked
- 3. Reminder emails** · staged for August 7 and 12
- 4. Day-after follow-up** · drafted for attendees and no-shows separately

Status

- Nothing is scheduled yet; the calendar waits for you

⊖ **YOU REVIEW** Every send waits for your green light.



Testimonial Harvest

● **Automation** · runs quarterly

PROMPT

Find all thank-you emails.
Rank the happiest customers.
Draft personal review requests.
Prep quotes for my website.

EmailWeb

↑

REVIEW REQUESTS

Testimonial Sweep - Q3
11 thank-you emails found in your sent-mail history.

Top candidates
1. **Dana Whitfield** · "you saved our opening date"
2. **Mike Terry** · "only sub who hit every date this year"
3. **Rob Feld** · praised the change-order handling

Drafted

- Personal review requests for all three
- Website quote blocks, pending their permission

⊖ **YOU REVIEW** Ask permission first. Nothing publishes without the customer's OK.





Website Update

● **On-demand** · run it when you have new copy

PROMPT

Update homepage testimonials section.
Add Dana's quote from the harvest.
Match the voice and length of the live ones.
Use attached image.
Draft the updated section for my review.

Docs

Marketing Assets

Attachment



PAGE UPDATE

Homepage · Testimonials draft

Adding

Dana Whitfield · Gulf Coast Interiors

> "You saved our opening date. We would hire them again tomorrow."

Fit check

- Length matches the two quotes already on the page
- Attribution line uses the same format
- Image cropped and resized to match format

Ready

- Updated section drafted; nothing published yet



YOU REVIEW You approve the wording. Nothing goes live without you.



Morning Inbox Triage

● **Automation** · runs daily, 6:45 AM

PROMPT

Archive high-quality spam (cold emails).
Categorize what needs my attention.
Summarize the long threads.
Draft the routine replies.
Flag the real decisions.

Email

↑

TRIAGE REPORT

Inbox Triage - 6:58 AM

Needs you (3)

- Bond renewal question from your agent
- Ritter Glass change order · summary attached
- Insurance cert request, due Friday

Drafted replies (6)

- Scheduling confirmations, vendor follow-ups, one intro

Summarized (2)

- The 40-message permit thread, in six bullets

Filed (41)

- Newsletters, promos, receipts

 **YOU REVIEW** Nothing sends without you.





Invoice Chaser

● **Automation** · runs Mondays from A/R aging

PROMPT

Find what's overdue.
Check the payment history.
Draft reminders, politely escalating.
Flag accounts that need a call.

QuickBooks

Email

↑

REMINDER DRAFTS

A/R Chase - Monday

- Manatee Paving** · \$8,200 · 31 days · gentle reminder drafted
- Baypoint HVAC** · \$12,400 · 52 days · firmer draft, cites the terms
- Gulf Coast Interiors** · \$3,100 · 84 days · flagged: call, don't email

History notes

- Baypoint always pays after one reminder
- Gulf Coast has never been this late; something may be wrong

⊖

YOU REVIEW You know the relationships. Soften one, hold another, then send.



Talk → SOP

● **On-demand** · meeting transcript or voice directly

P R O M P T

Turn this walkthrough into steps.
Compare to existing SOPs.
Add checklists and edge cases.
Name tools and owners.

Voice

Docs



S O P

SOP Draft · Project Closeout Package

From your six-minute walkthrough.

The document

- 12 steps, in order, with the two you almost skipped
- Checklist for the punch-list photos
- Edge cases: missing lien waivers, late inspections, HOA sign-off

It asked you

- Who owns the final photo set?
- Where does the signed closeout live?



YOU REVIEW Walk it once yourself before anyone else runs it.



Vendor Quote Comparison

● **On-demand** · run it when the last quote arrives

P R O M P T

Extract pricing and terms from these quotes.
Match scopes despite different wording.
Flag exclusions and assumptions.
List questions for each vendor.

Files

Web

↑

C O M P A R I S O N

Quote Comparison - Crane Service

- Apex Crane** · \$14,800 · excludes permits and traffic plan
- Gulf Lift** · \$16,200 · includes both, weekend rate locked
- Suncoast Hoist** · \$13,900 · silent on warranty, excludes weekends

Scope notes

- All three describe the same lift plan in different words; matched line by line

Questions drafted

- One per vendor, aimed at the gaps above

⊖ **YOU REVIEW** Confirm exclusions and terms yourself before you award.



Competitor Comparison Page

● **On-demand** · run it with a competitor's name

PROMPT

Research their public claims and pricing signals.
Map honest strengths and gaps on both sides.
Draft the comparison page sections.
Flag claims that need proof before publish.

Web

↑

PAGE DRAFT

Comparison Page - Draft

Sections drafted

- Where they are genuinely strong (coverage, financing)
- Where you win: response time, owner on every site, local crews
- Pricing signals from public sources, dated

Held for proof

- Three claims need evidence before they publish
- Their financing terms may have changed; flagged for a re-check

⊖ **YOU REVIEW** You own accuracy. Nothing unfair ships.



Meeting → Motion

 **On-demand** · run it with the transcript

PROMPT

Write the minutes from this voice memo.
Pull decisions and owners.
Draft the task list.
Prep the recap email.

Transcripts

Email

Tasks



RECAP AND TASKS

Ops Weekly · Recap

Decisions

- Waterside punch list closes Friday
- Hold the Venice bid until the geotech report lands

Tasks (5)

1. **Alex** · order the stair railings · Wednesday
2. **Jay** · call the inspector about Thursday
3. - 3 more, each with an owner and a date

Recap email

- Drafted to the team, decisions on top

 **YOU REVIEW** Confirm the owners before the recap goes out.



Contract First Read

● **On-demand** · run it before you sign

PROMPT

Flag dates and auto-renewals.
List my obligations.
Compare to my usual terms.
Write questions for my attorney.

Files

↑

FIRST READ

First Read - Coastal Mechanical MSA

Flags

- Auto-renews annually; 60-day cancellation window
- Payment terms are 60 days; yours are 30
- Indemnification runs one direction, theirs

Your obligations

- Insurance certs within 10 days of signing
- Monthly safety reporting, a new one for you

For your attorney

- Four questions drafted, cited to page and section

 **YOU REVIEW** This is a first pass, not legal advice. Your attorney decides.



Monday Scorecard

● **Automation** · runs Mondays, 7:00 AM

PROMPT

Gather the week's numbers.
Compare to last month and target.
Call out the anomalies.
Write a one-page scorecard.
Update internal reporting site.

CRM

Sheets

↑

SCORECARD

Monday Scorecard - July 20

- **Pipeline:** \$214K · up 8% on June
- **Win rate:** 31% · target is 35%
- **Days-to-paid:** 41 · third straight week improving

Anomaly

- Quote volume is down three weeks straight
- Same stretch your top referrer went quiet; likely related

Suggested question

- What changed in mid-June?

⊖ **YOU REVIEW** The scorecard starts the conversation. You steer it.



New-Hire Packet

● **On-demand** · run it when you make the hire

PROMPT

Pull the role's SOPs and tools.
Write the first-week plan.
Draft intros and logins list.
Assemble the welcome doc.

Files

Docs

ATS



ONBOARDING PACKET

Onboarding · Alex, Project Coordinator

The packet

- First-week plan, day by day, with who to shadow
- Role SOPs: closeout, submittals, RFI log
- Logins list with who grants each one
- Intro emails to the team and two key vendors, drafted

From your knowledge map

- Every doc links back to the source of truth



YOU REVIEW The culture introduction comes from you.

Local Bid / Project Radar

● **Automation** · runs weekly

PROMPT

Scan approved local opportunity sources.
Rank by fit and timing.
Suppress noise and duplicates.
Write the weekly radar brief.

Web

↑

RADAR BRIEF

Bid Radar · Week of July 20

1. **UTC medical office** · shell package fits your scope · due August 8

2. **Venice charter school** · GC is shortlisting subs now · call this week

3. **Lakewood Ranch phase 4** · early stages · watch list

Dropped

- 17 listings: out of scope, out of range, or duplicates

Sources

- Every item links to where it was found

⊖ **YOU REVIEW** You decide which opportunities get a follow-up.



Daily Content Radar

● **Automation** · runs mornings

PROMPT

Digest recent newsletters into topics.
Score each for relevance to my ICP.
Match the best topic to the next post slot.
Draft the post from my angle, voice and company knowledge.

Email

Docs



CONTENT BRIEF

Content Brief · July 22

- **Topic pick:** the permit surge and what it does to sub scheduling
- **Why now:** high operator consequence, 48-hour news hook
- **Your angle:** you scheduled through the last surge; say what worked

The draft

- 130 words, your voice, one hard number from company knowledge

Skipped topics

- Two scored low: vendor news, a national story with no local angle



YOU REVIEW Edit, then you post. Nothing publishes itself.



Voice Note → Social Post

● **On-demand** • run it with a voice note

PROMPT

Transcribe the voice note.
Extract the core claim and facts.
Draft the post in my voice.
Flag anything that needs a source check.

Voice



POST DRAFT

Post Draft - From Your Voice Note

- **Core claim:** rush jobs get quoted wrong when the site visit is skipped
- **Draft:** 120 words, your voice, ends with the question you asked in the truck

Flagged

- The "half our rework" line needs a source before it posts

Tone check

- No hedging added, no emojis, sounds like you



YOU REVIEW Cut anything you would not say out loud. Then post.



Long Doc → Decision Brief

● **On-demand** · run it with the document

PROMPT

Read the full document.
Extract the highest-consequence findings.
State risks and open questions.
Write a one-page decision brief.

Files



DECISION BRIEF

Decision Brief - Vendor Renewal Proposal

40 pages read. The decision: renew, renegotiate, or drop.

Highest consequence

- Price up 14%; the SLA is unchanged
- A termination fee appears in section 9 that wasn't there last term
- Support hours quietly narrowed

Open questions

- Three drafted for the vendor, cited to page

If you do nothing

- Auto-renews August 31 on the new terms



YOU REVIEW The brief informs. You decide.



Your Next Workflow

● **On-demand** · run it this week

PROMPT

Take one workflow from today.
Set it up this week.
Ask for help when I need it.



YOUR RESOURCES



Scan to run it

bigrobot.net/next

All 35 workflows with prompts
Assessment request if you want a second set of eyes