



Gig City .ai

SMALL BUSINESS DIY GUIDE

The Work Behind The Work

**A DIY guide to using AI for the work that
keeps your business running**

Free tools. Practical prompts. Owner-reviewed workflows.

Why This Guide Exists

Most small-business owners do not start out wanting more admin.

You start with the work people pay you for. You fix the system, cut the hair, run the appointment, manage the job, serve the customer, make the product, teach the class, design the space, or deliver the service.

Then the business keeps moving, and the work around the work starts taking up more of the day.

The follow-up. The scheduling. The inbox. The quote that needs to go out. The customer who needs an answer. The staff member who needs the process written down. The review you meant to ask for. The policy that lives in your head. The marketing you keep putting off. The notes that never become next steps.

This is the work behind the work.

It takes up more owner time than most people see from the outside.

According to U.S. Bureau of Labor Statistics data, about 57% of businesses started in 2018 were still operating five years later. Use that number as context, not fear. Plenty of businesses close for reasons that have nothing to do with the owner's craft. Still, every owner understands the larger point: running the business becomes its own job.

This guide gives you practical ways to reduce that load with the tools you can start using for free.

At Gig City AI, we built it for small-business owners who want help with follow-up, admin, customer communication, marketing, notes, decisions, and daily operations.

You do not need a paid software stack to begin. For most common small-business uses, the free versions of common AI tools are enough to try the first version safely. Throughout this guide, **free tools** means those free AI tool tiers plus the documents, spreadsheets, email, calendar, notes, and other tools you already use.

The practical question is simple:

If a task comes up again and again, can a free AI tool help you get through the first draft, first summary, first checklist, or first organized version faster, while you still review and approve the result?

If yes, you may get some time back. You may also reduce rereading, dropped follow-up, repeated rewriting, and the feeling that every small admin task has to start from zero.

A Short Note Before You Use This Guide

This guide is for general education. It is not legal, medical, financial, tax, HR, or compliance advice. Use your own judgment and consult qualified professionals where needed.

AI tools can draft, organize, summarize, compare, and prepare. They should not be treated as the final authority on facts, customer promises, pricing, employee issues, legal language, medical information, taxes, or business decisions.

Keep your business judgment in charge. Use AI tools to draft, organize, and prepare the work so you are not starting from a blank page every time.

Guide Map

Start with the section that matches the problem in front of you. You do not have to read this guide front to back.

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SHORTCUT

Find Your Problem

Use this page as a shortcut. Start with the sentence that sounds most like your week.

If this sounds familiar...	Go to...
Leads come in, but replies and next steps are inconsistent.	Lead Follow-Up
Customers ask the same questions over and over.	Repeated Customer Questions / FAQ Bank
A customer says yes, but onboarding is inconsistent.	New Customer Onboarding
Past customers disappear because nobody checks back in.	Dormant Customer Re-Engagement
Happy customers rarely leave reviews or referrals.	Reviews, Testimonials, And Referrals
Difficult customer replies take too long to write.	Difficult Customer Messages
Customers may need related services, but follow-up offers are ad hoc.	Upsell / Cross-Sell Opportunities
You know what you offer, but explaining it clearly is hard.	Offer Clarity / Service Explainers
Marketing gets pushed aside because you do not have time.	Marketing Consistency
You want to stay in touch but never know what to send.	Newsletter / Email Updates
Seasonal or local promotions happen too late.	Local Event Or Seasonal Promo Planning
Good work gets done but never turns into proof.	Before/After Story Capture
Quotes or proposals take too long to prepare.	Quote / Proposal Prep
Intake arrives scattered, incomplete, or hard to route.	Messy Intake
Your inbox is a pile of requests, reminders, and noise.	Inbox Triage
Scheduling needs reminders, prep instructions, or reschedule help.	Scheduling / Appointment Prep
Meeting, call, or job notes do not turn into action.	Meeting / Call / Job Notes
You need forms, checklists, or request templates.	Form Creation
Documents are outdated, wordy, or hard to use.	Document Cleanup
You need a simple view of open loops and priorities.	Weekly Owner Recap / Basic Reporting
You have too many tasks and no clear order.	Task Prioritization
Too much process knowledge lives in your head.	Staff Checklists / Process Docs
Work gets dropped between people or steps.	Handoff Clarity
New employees learn by shadowing but have no guide.	New Employee Onboarding
Hiring starts with "we need help" but no clear role.	Hiring Post / Role Clarity
Interviews rely too much on gut feel.	Interview Questions
Feedback is hard to write clearly and fairly.	Performance Feedback Drafting
Internal updates create confusion.	Internal Announcements
Payment reminders are awkward to send.	Invoice / Payment Follow-Up
You need to explain a price change carefully.	Price Increase Communication
Vendor emails take too long to write.	Vendor Email Drafting
Bookkeeping questions need better notes before handoff.	Expense / Bookkeeping Prep Notes
You need to compare options before deciding.	Decision Support / Vendor Comparison

Keep Your Judgment In Charge

This is a reference guide, not a course. You do not have to read it front to back. Find the pressure point that matches what is bugging you right now. If leads are getting lost, go to Lead Follow-Up. If your inbox is a mess, go to Inbox Triage. If your staff keeps asking the same process questions, go to Staff Checklists / Process Docs. If you never know what to post, go to Marketing Consistency. If you need to compare options, go to Decision Support / Vendor Comparison. Each pressure-point chapter follows the same structure:

1. What this looks like
2. Why it costs you time
3. Free tools needed
4. What to gather first
5. Complete starter prompt
6. Walkthrough
7. What not to let AI do here
8. Review checklist
9. Iteration prompts
10. Short example
11. Time ROI
12. If this helps

Once you learn how one chapter works, you can use the rest the same way. Each chapter helps you get a useful first draft, summary, checklist, plan, or organized version of something you already understand. You still own the judgment.

AI tools are useful, but you should be thoughtful about what you paste into them. As a general rule, do not paste anything you would not want stored in a third-party tool. Do not paste:

- Social Security numbers
- payment card or bank details
- passwords or access codes
- full medical details
- private legal facts
- employee discipline details
- sensitive customer records
- confidential contracts
- tax documents
- private account numbers
- anything covered by a confidentiality obligation you do not fully understand

You can still use AI for sensitive-adjacent work if you rewrite the example in general terms. Instead of pasting:

"Jane Smith at 123 Oak Street owes \$4,812.17 and said she may sue us if we charge the late fee."

You could write:

"A customer has an overdue invoice and is upset about a possible late fee. I need help drafting a calm reply that asks for a call and does not make legal threats or promises."

That gives the tool enough context to help with wording without exposing details it does not need.

How To Make Examples Safer

Before pasting material into an AI tool:

- remove names if names are not needed
- remove account numbers, addresses, dates of birth, and payment details
- summarize sensitive facts in general terms
- replace exact dollar amounts if they are not needed
- paste only the part needed for the task
- avoid uploading private documents unless you understand the tool's settings and policies
- when in doubt, describe the situation instead of copying the original record

Remember: AI can organize, draft, and prepare. It should not be the authority on sensitive business decisions.

Use The Tool Without Handing It The Business

The free tiers of common AI tools can do useful work when you give them enough context and review the output carefully. These habits will make the walkthroughs in this guide easier to use.

Start A Fresh Chat For Each Task

Do not mix lead follow-up, hiring, marketing, customer complaints, and payment reminders in the same chat. Start a new chat when the task changes. It keeps the context cleaner and makes it easier to save useful prompts later.

Give Enough Context Up Front

A short prompt can work for simple tasks, but most business tasks need context. Include:

- what kind of business you run
- who the customer or audience is
- what you are trying to create
- what material you are giving the tool
- what tone you want
- what the tool should not invent
- what needs human approval

Paste Only What The Tool Needs

More information is not always better. Give the tool the material it needs for the task, but remove private or unnecessary details first.

Ask For Questions When Information Is Missing

AI tools can sound confident even when they do not have enough information. One of the best ways to use them is to ask:

If important information is missing, list the questions I should answer before using the output.

That makes the tool useful for finding gaps, not just generating text.

Review Before Using Anything

Review anything that goes to a customer, employee, vendor, partner, or public channel. Check for:

- invented facts
- wrong assumptions
- tone that does not sound like you
- unsupported promises
- missing next steps
- sensitive information
- language that sounds too formal, too pushy, or too generic

Save What Works

Do not make yourself start over every time. Keep a simple document called something like:

- AI Prompts That Worked
- Reply Examples

- Business Drafts
- Follow-Up Templates
- Useful Checklists

Save the prompts and edited examples you would actually use again.

Improve In Rounds

The first output is not the final version. Useful AI work often looks like this:

1. Ask for a first draft.
2. Review it.
3. Correct facts or assumptions.
4. Ask for a shorter, warmer, clearer, or more specific version.
5. Check it again.
6. Save the useful version.

Revision is part of the process.

Keep The Human Decision Visible

AI can prepare work. You still own the judgment. That keeps the work grounded in your business.

A good starter prompt gives the AI enough context to produce a useful first draft. It will probably still need review and revision. Use this pattern when you are not sure how to begin:

```
I run a [business type] in [location or market] serving [customer type].

I need help with [task] because [business problem].

Here is the material I want you to use:
[paste or summarize material]

Please create [specific output].

Use this tone:
[tone]

Do not invent facts, prices, policies, availability, guarantees, discounts, legal claims, or promises.

Mark anything that needs human approval.

If important information is missing, list the questions I should answer before using the output.

Return the answer in [format].
```

You will see this pattern throughout the guide. The details change by pressure point, but the basic shape stays the same:

- context
- task
- source material
- output
- tone
- limits
- human approval
- format

Those details help the tool give you something useful instead of generic.

Before you use an AI output, slow down long enough to check it. You do not need to become a technical reviewer. You need to ask the same kinds of questions you would ask before sending any business communication or using any business document.

Accuracy

Is it true? Check facts, names, dates, numbers, service details, pricing, and policies.

Assumptions

Did the tool assume something you did not tell it? If you are not sure, ask:

Show me what facts or assumptions you used to create this.

Tone

Does it sound like your business? If it sounds stiff, generic, overly cheerful, or too much like marketing copy, ask for a revision.

Missing Information

Does the output need more detail before it can be used? Ask:

What information is missing that would make this more accurate or useful?

Promises

Did it promise a price, timeline, outcome, discount, guarantee, or policy you did not approve? Remove or revise anything that commits the business before you have checked it.

Privacy

Does the output include private, sensitive, or unnecessary details? Remove what does not need to be there.

Next Step

Is the next step clear? Good business communication usually tells the reader what happens next.

Human Approval

Would you be comfortable putting your name on it? If not, keep revising.

PART 1

Customer And Revenue

1. Lead Follow-Up
2. Repeated Customer Questions /
FAQ Bank
3. New Customer Onboarding
4. Dormant Customer Re-
Engagement
5. Reviews, Testimonials, And
Referrals
6. Difficult Customer Messages
7. Upsell / Cross-Sell Opportunities

Lead Follow-Up

What This Looks Like

A lead comes in through a form, email, voicemail, text, or social message. You plan to reply quickly. Then the message lands in the middle of a job, an appointment, a school pickup, a staff question, or another customer issue. By the time you get back to it, you have to reread the message, figure out what they need, look for missing details, decide what to say, and remember whether you owe them another follow-up. One inquiry is easy to remember. Six inquiries across email, voicemail, contact forms, texts, and social messages are harder to keep straight. AI can turn a messy inquiry into a clearer first draft:

- what the person is asking for
- what information is missing
- what a reasonable reply could say
- what needs your approval
- what follow-up should happen next

You still review the reply. The tool gives you a usable starting point faster.

Why It Costs You Time

Slow follow-up costs more than the few minutes it takes to write a reply. You lose time reconstructing context. You reread the original message, search for related details, remember what you usually say, and decide what the next step should be. You may also lose the lead. A person who was interested on Tuesday may have called someone else by Thursday. You also end up rewriting the same kind of reply over and over. The details change, but the shape is familiar: thank them, clarify the need, ask for missing information, explain the next step, and follow up if they do not answer. This chapter helps you make that first pass faster without handing the customer relationship to a tool.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- your existing email, contact form, voicemail transcript, text message, or social message inbox
- a document or notes app for saving useful replies (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: a spreadsheet for tracking open leads (examples: Google Sheets, Excel, Numbers)

No paid tools are required for this DIY version. Remember: if a message includes sensitive customer information, rewrite the example in general terms before pasting it into an AI tool.

What To Gather First

Before opening the AI tool, gather 3-5 recent inquiries. For each inquiry, remove sensitive information and keep only what the tool needs:

- what the person is asking for
- timing or urgency
- service or product requested
- location if relevant
- any constraints
- how you normally respond
- what AI must not promise

Write down the tone you want before you ask for the reply. Examples:

- Plain, friendly, and not pushy.

- Professional, concise, and warm.
- Direct, practical, and clear.

The tool does not know your business voice unless you give it a little direction.

Complete Starter Prompt

Copy, paste, and customize this prompt:

I run a [type of business] in [city/region] serving [type of customer].

I am going to paste a customer inquiry. Help me prepare a follow-up, but do not invent facts, prices, availability, discounts, policies, guarantees, or promises.

Your job:

1. Summarize what the customer is asking for.
2. List any missing information I need before responding fully.
3. Draft a friendly reply in my business voice.
4. Create a short follow-up checklist.
5. Mark anything that needs human approval.

Use this tone:

[plain/friendly/professional/local/warm/direct]

If important information is missing, ask questions instead of filling in the blanks.

Customer inquiry:

[paste or summarize inquiry here]

Walkthrough

1. Open a free AI chat tool.
2. Start a fresh chat.
3. Paste the complete starter prompt.
4. Replace the bracketed sections with your business details.
5. Paste one inquiry at a time.
6. Read the summary first.
7. If the summary is wrong, correct it before using the draft reply.
8. Review the missing-information list.
9. Read the draft reply out loud.
10. Remove anything that sounds too formal, too pushy, too generic, or unlike your business.
11. Check whether the tool invented a price, timeline, discount, guarantee, or policy.
12. Save any useful edited language in a document called something like **Lead Reply Examples**.

Start with one inquiry. If it helps, try another.

What Not To Let AI Do Here

Do not let AI decide:

- pricing
- availability
- discounts
- service eligibility
- whether a customer is a good fit
- what the business can promise
- whether a legal, medical, financial, or sensitive issue is safe to answer

AI can prepare a draft. You approve the message.

Review Checklist

Before using the output, check:

- Did AI correctly understand the request?
- Did it invent a price, timeline, discount, service area, or guarantee?
- Does the reply sound like your business?
- Is the next step clear?
- Does the customer need a call, quote, form, appointment, or more information?
- Is there anything sensitive that should not be included?
- Did the tool mark anything that needs human approval?
- Would you be comfortable sending this with your name on it?

Iteration Prompts

Use these after the first output:

Make the reply shorter and more natural.

Make this sound less like marketing and more like a real local business owner.

Ask me three clarifying questions before drafting the final reply.

Turn this into a text-message version under 500 characters.

Show me what facts you assumed so I can verify them.

Create a follow-up version if the customer does not respond in three days.

Short Example

Example business: a home-services company. The owner receives this inquiry:

Hi, I found you online. We have a small leak under the kitchen sink and also want someone to look at our water pressure. Are you available this week?

The owner could paste a version like this into the prompt:

I run a home-services company serving local homeowners.

I need help replying to this inquiry. Do not invent pricing, availability, guarantees, or service promises.

Tone: friendly, clear, and not pushy.

Customer inquiry:

A homeowner says they have a small leak under the kitchen sink and also want someone to look at water pressure. They asked whether we are available this week.

A solid output might include:

- summary: leak under kitchen sink, water pressure concern, availability question
- missing information: address or service area, urgency, photos if helpful, preferred times, whether the leak is active
- draft reply: thanks them, asks a few clarifying questions, offers to check scheduling, avoids promising availability until confirmed
- follow-up checklist: collect details, confirm service area, check schedule, reply with the next step

Why this works: The prompt gives the tool enough context to help without letting it invent the parts that matter: price, availability, guarantee, or final commitment.

Time ROI

This is not a guaranteed time savings. Use it as a simple way to decide whether the habit is worth repeating. If this saves 10 minutes each time and you handle 6 similar inquiries per week:

$$10 \text{ minutes} \times 6 \text{ inquiries} = 60 \text{ minutes per week}$$

That comes out to about 1 hour per week. The time savings may come from:

- less rereading
- fewer missed details
- clearer next steps
- fewer open loops sitting in your head
- reusable reply language
- fewer leads left hanging

If This Helps

If this helps, save the prompt and your best edited replies somewhere easy to find. You can make the next inquiry easier by keeping:

- your best starter prompt
- a few edited reply examples
- a missing-information checklist
- a short list of phrases that sound like your business
- a simple open-leads tracker with name, date, need, next step, and follow-up date

If this comes up often, map the steps:

1. Where does the inquiry come from?
2. What information do you need before replying?
3. What can AI help prepare?
4. What must you review?
5. Where do you save the next step?
6. When do you follow up?

This is still DIY. You are saving the steps that worked so the next inquiry takes less effort.

Repeated Customer Questions / FAQ Bank

What This Looks Like

Customers ask the same questions in different ways. Do you serve my area? How much does this cost? How do I prepare? What happens after I book? Can I bring my child? Do you handle this kind of job? What should I expect at the first appointment? You answer these questions from memory, usually while doing something else. The answer may be right, but it changes a little each time. If more than one person on your team replies, the answers may change even more. The questions you already answer can become a simple FAQ bank.

Why It Costs You Time

Repeated questions cost time because they interrupt the day in small pieces. Each answer may only take a few minutes, but the mental switch adds up. The other cost is inconsistency. A customer may get a careful answer one day and a rushed answer the next. A staff member may say something slightly different from what you would have said. A good FAQ bank gives you a shared starting point.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- your existing email, texts, contact form messages, reviews, or social comments
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version.

What To Gather First

Gather 10-20 real questions customers have asked. Remove names, account details, private records, and anything the tool does not need. For each question, add the answer you normally give if you already know it. If you do not have a settled answer, mark it as "needs owner decision."

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I want to build a simple FAQ bank from questions customers already ask us.

Here are the customer questions and any rough answers I already use:
[paste questions and rough answers]

Please create:

1. A clean FAQ list grouped by topic.
2. A plain-English answer for each question.
3. A list of questions where my policy, pricing, availability, or final answer is unclear.
4. A shorter version of each answer that could be used in email, text, or social messages.

Use this tone:

[plain/friendly/professional/direct]

Do not invent policies, prices, timelines, guarantees, service areas, eligibility rules, or legal claims.

Mark anything that needs owner approval before we use it.

Walkthrough

1. Start a fresh chat.
2. Paste the starter prompt.

3. Add your business type and customer type.
4. Paste your cleaned-up list of questions.
5. Read the grouped topics first.
6. Move any question that is in the wrong topic.
7. Check every answer against your actual policy.
8. Mark answers that need a decision before anyone uses them.
9. Save the approved answers in a document your team can find.
10. Add new questions to the bank as they come in.

What Not To Let AI Do Here

Do not let AI make up your rules. Watch for invented details about:

- pricing
- refunds
- service area
- appointment availability
- guarantees
- cancellation policies
- what is included or excluded
- legal, medical, financial, or safety advice

Remember: the tool can help with wording and organization. You decide the answer.

Review Checklist

Before using the FAQ bank, check:

- Are the answers accurate?
- Are any policies missing?
- Did the tool invent a price, promise, or guarantee?
- Are the answers short enough for customers to use?
- Does the tone sound like your business?
- Can a staff member use this without needing to guess?
- Are sensitive details removed?

Iteration Prompts

Make these answers shorter and easier to scan.

Show me which answers require an owner decision before staff should use them.

Create a version written for text messages.

Rewrite the answers in a calmer tone for customers who are frustrated.

Turn this into a team reference sheet.

Short Example

Example business: a salon. Customer questions might include:

- Do you take walk-ins?
- How early should I arrive?
- What if I need to cancel?
- Can I book two services together?

A useful FAQ bank would group those under booking, arrival, cancellation, and services. It would also flag anything the owner needs to approve, such as cancellation fees or deposit rules.

Time ROI

If this saves 3 minutes per repeated question and you answer 20 repeated questions per week:

$3 \text{ minutes} \times 20 \text{ questions} = 60 \text{ minutes per week}$

The bigger gain may be consistency. The next answer starts from the approved version instead of whatever you remember in the moment.

If This Helps

Save the FAQ bank somewhere your team already looks. Keep three sections:

- approved answers
- answers that need owner review
- new questions to add later

Once a week, move useful new answers into the approved section.

New Customer Onboarding

What This Looks Like

A customer says yes. Now they need to know what happens next, what you need from them, what to expect, how to prepare, and who to contact. If that handoff is inconsistent, the first real experience after the sale can feel messier than it should.

Why It Costs You Time

Onboarding costs time when every new customer requires a fresh explanation. You answer the same questions, hunt for the same links, and remember the same instructions. A simple onboarding packet reduces repeated typing and makes the customer feel oriented.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- the first message you normally send after someone says yes
- prep instructions
- forms, links, or documents they need
- common questions new customers ask
- anything customers must know before the first appointment or job

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with creating a new customer onboarding message and checklist.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A welcome message.
2. A customer prep checklist.
3. A list of information I still need from the customer.
4. A short internal checklist for my team.
5. Anything that needs my approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent prices, dates, availability, policies, guarantees, legal language, or service promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- final pricing or availability
- refund or cancellation rules
- service guarantees
- legal, medical, or financial instructions
- what your team can promise

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Does the customer know what happens next?
- Are all links and documents correct?
- Did the tool invent a policy or timeline?
- Is the tone calm and clear?
- Can your team use the internal checklist?

Iteration Prompts

Make the customer message shorter and easier to read.

Create a version for email and a shorter version for text.

Show me what information the customer still needs to provide.

Turn this into a one-page onboarding checklist.

Make this sound more like our business and less formal.

Short Example

Example business: a therapy or wellness office. The owner gathers the intake form link, parking instructions, cancellation reminder, and what to expect at the first visit. The tool turns those pieces into a welcome email and a short checklist for the front desk.

Time ROI

If this saves 15 minutes each time and you do it 4 times per week:

15 minutes x 4 times = 60 minutes per week

If This Helps

Save one approved onboarding message and one internal checklist. When the next customer says yes, start from those two pieces instead of rewriting the whole handoff.

Dormant Customer Re-Engagement

What This Looks Like

Past customers drift away. They may still like your business, but they have not heard from you in a while, or you have not had time to check back in. The follow-up can feel awkward if you have to write it from scratch.

Why It Costs You Time

Re-engagement takes time because you have to choose who to contact, what reason to give, and how to sound helpful instead of needy. A simple draft can make the first check-in easier.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)
- optional: a spreadsheet (examples: Google Sheets, Excel, Numbers)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- a list of past customer groups, not private records
- the last service or product category if relevant
- a reason to check in
- any current offer or seasonal reminder
- what you do not want to promise

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with writing a respectful check-in message for past customers.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A short re-engagement email.
2. A text-message version.
3. A subject line or opening line.
4. A follow-up reminder checklist.
5. A list of claims or details I need to approve.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent customer history, discounts, outcomes, testimonials, availability, or promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- who should receive a message if the list is sensitive
- special discounts you have not approved
- claims about past customer satisfaction
- medical, financial, or legal advice
- pressure tactics

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the reason for reaching out clear?
- Does the message respect the past customer?
- Did the tool invent history or results?
- Is there a clear next step?
- Is the message easy to ignore without feeling pressured?

Iteration Prompts

Make this warmer and less salesy.

Create three versions for different customer groups.

Make this under 500 characters for text.

Remove anything that sounds urgent or pushy.

Create a follow-up version if they do not reply.

Short Example

Example business: an auto repair shop. The owner wants to remind customers about seasonal maintenance. The tool drafts a short check-in that mentions the season, asks whether they need help scheduling, and avoids making claims about their specific vehicle.

Time ROI

If this saves 20 minutes each time and you do it 2 times per week:

$20 \text{ minutes} \times 2 \text{ times} = 40 \text{ minutes per week}$

If This Helps

Keep a small re-engagement library by customer group: seasonal reminders, annual check-ins, and service follow-ups. Review the list before sending anything.

Reviews, Testimonials, And Referrals

What This Looks Like

Customers say nice things in person, by text, or in passing. Then the moment disappears. You meant to ask for a review, testimonial, or referral, but the day moved on.

Why It Costs You Time

The ask can feel uncomfortable because you want to be respectful. You also need to avoid putting words in the customer's mouth. A prepared request makes it easier to ask at the right time.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- when it makes sense to ask
- where you want reviews left
- what kind of customer should receive the request
- any wording you already use
- any platform rules you need to follow

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting review, testimonial, and referral requests.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A review request email.
2. A shorter text version.
3. A testimonial request that does not write the testimonial for the customer.
4. A referral request option.
5. A checklist for when to send each one.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent customer quotes, ratings, results, incentives, platform rules, or referral promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- fake testimonials
- customer quotes
- review incentives you have not approved
- pressure language
- platform compliance decisions

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Does the request sound respectful?
- Is the customer free to ignore it?
- Did the tool invent a quote or result?
- Is the review link correct?
- Does the timing make sense?

Iteration Prompts

Make this less awkward and more natural.

Create a version for a happy customer after a completed job.

Create a version for a long-time customer.

Make this shorter for text.

Remove anything that sounds like pressure.

Short Example

Example business: a contractor. After a project wraps, the owner gives the tool the review link, the kind of work completed, and the tone they want. The draft asks for an honest review without suggesting what the customer should say.

Time ROI

If this saves 8 minutes each time and you do it 5 times per week:

8 minutes x 5 times = 40 minutes per week

If This Helps

Save three approved requests: review, testimonial, and referral. Add a simple reminder to ask after the job, appointment, or delivery is complete.

Difficult Customer Messages

What This Looks Like

A customer is upset, confused, late, disappointed, or asking for something outside your policy. You know you need to respond carefully. The first draft takes longer because tone matters.

Why It Costs You Time

Difficult messages cost time because you have to slow down. A rushed reply can create more work. A too-formal reply can make the customer feel dismissed. A careful first draft gives you something to review before you send.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version. Remember: Rewrite sensitive situations in general terms before pasting them into an AI tool.

What To Gather First

Gather:

- what happened in neutral terms
- what the customer is asking for
- your actual policy or boundary
- what outcome you want
- what you should not promise

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a careful customer reply to a difficult situation.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A short summary of the situation.
2. A calm draft reply.
3. A list of any risky language to avoid.
4. A version that asks for a call if needed.
5. Anything that needs owner approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent fault, legal conclusions, refunds, policy exceptions, promises, medical advice, financial advice, or blame.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- legal position
- fault or liability
- refund decisions
- discipline decisions
- policy exceptions
- emotional judgment about the customer

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the reply calm?
- Does it avoid blame?
- Did the tool invent a policy exception?
- Is the next step clear?
- Should this be reviewed before sending?

Iteration Prompts

Make this calmer and shorter.

Remove any language that admits fault or makes legal claims.

Create a version that asks for a phone call.

Make this firm without sounding rude.

List the assumptions you made.

Short Example

Example business: a retail shop. A customer is upset about a return outside the normal window. The owner summarizes the policy without customer names. The tool drafts a calm reply that explains the policy and offers a next step without inventing an exception.

Time ROI

If this saves 20 minutes each time and you do it 2 times per week:

$20 \text{ minutes} \times 2 \text{ times} = 40 \text{ minutes per week}$

If This Helps

Save approved language for common difficult moments: delay, misunderstanding, refund request, policy boundary, and apology. Do not send sensitive replies without review.

Upsell / Cross-Sell Opportunities

What This Looks Like

Customers may need related services or products, but bringing them up can feel awkward. You do not want the customer to feel pushed. You also do not want useful options to go unmentioned.

Why It Costs You Time

The time cost is deciding what is relevant and how to explain it simply. A good prompt can help you prepare helpful suggestions based on the customer's actual need.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- your main products or services
- common related needs
- what should never be pushed
- customer situations where a related offer is helpful
- your preferred tone

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with identifying helpful related offers and drafting low-pressure language.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A list of related offers by customer need.
2. A short explanation for each offer.
3. Low-pressure wording for email or conversation.
4. A checklist for when the offer is appropriate.
5. Anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent customer needs, results, discounts, guarantees, inventory, pricing, or urgency.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- whether a customer must buy something
- fake urgency
- medical, legal, or financial recommendations
- claims about outcomes
- pricing you have not approved

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the offer actually relevant?
- Does it sound helpful instead of pushy?
- Did the tool invent urgency or results?
- Is the customer free to say no?
- Is pricing accurate or left for review?

Iteration Prompts

Make this more helpful and less salesy.

Create a version for an existing customer.

Create a version for a new customer.

Remove urgency language.

Turn this into a staff conversation guide.

Short Example

Example business: a cleaning company. The owner lists standard cleaning, deep cleaning, move-out cleaning, and add-on fridge or oven cleaning. The tool creates simple language for mentioning add-ons only when they fit the customer's situation.

Time ROI

If this saves 10 minutes each time and you do it 3 times per week:

10 minutes x 3 times = 30 minutes per week

If This Helps

Keep a related-offer map by customer situation. Use it as a reminder, not a script that forces every customer into another purchase.

PART 2

Marketing And Sales Communication

1. Offer Clarity / Service Explainers
2. Marketing Consistency
3. Newsletter / Email Updates
4. Local Event Or Seasonal Promo Planning
5. Before/After Story Capture
6. Quote / Proposal Prep

Offer Clarity / Service Explainers

What This Looks Like

You know what you sell, but explaining it clearly can be harder than doing the work. Customers may not understand what is included, who it is for, when they need it, or what happens next.

Why It Costs You Time

Unclear offers create extra questions, mismatched expectations, and longer sales conversations. A clear explainer reduces repeated clarification.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- the service or product name
- who it is for
- what is included
- what is not included
- common customer questions
- the next step to buy or book

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with writing a plain-English service explainer.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A short service explainer.
2. A longer website version.
3. A bullet list of what is included.
4. A list of common questions and answers.
5. A clear next step.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent pricing, availability, guarantees, credentials, outcomes, policies, or included services.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- new service terms
- promises you cannot keep
- pricing decisions
- eligibility rules
- regulated advice

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Would a customer understand the offer?
- Is anything overpromised?
- Are exclusions clear?
- Is the next step easy to find?
- Does it sound like your business?

Iteration Prompts

Make this easier for a first-time customer to understand.

Create a shorter version for social media.

Create a website version with headings.

List what is unclear or missing.

Make this more direct and less polished.

Short Example

Example business: a bookkeeping firm. The owner lists monthly bookkeeping, receipt cleanup, bank reconciliation, and monthly reports. The tool turns that into a clear explanation of what the service includes and what requires a separate conversation.

Time ROI

If this saves 30 minutes each time and you do it 1 times per week:

30 minutes x 1 times = 30 minutes per week

If This Helps

Save one plain-language explainer for each core offer. Use those explainers on your website, in replies, and when training someone else to describe the business.

Marketing Consistency

What This Looks Like

You know marketing matters, but it is easy to push aside. Customer work comes first. Admin comes next. By the time you think about posting, emailing, or updating the website, the day is already full. Then marketing becomes a last-minute task. You post when you remember. You repeat the same offer. You stare at a blank page and decide to try again tomorrow. Real business activity can become a simple marketing plan.

Why It Costs You Time

Marketing is hard to do consistently when every idea has to start from scratch. The work includes more than writing. You have to decide what to talk about, who needs to hear it, what proof you can show, what offer makes sense, and what next step to include. A simple content plan reduces the blank-page problem.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: a design tool with a free tier (example: Canva Free)
- optional: a spreadsheet for a simple calendar (examples: Google Sheets, Excel, Numbers)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- your main services or products
- common customer questions
- seasonal needs
- recent work you can talk about without exposing private details
- reviews or testimonials you are allowed to use
- offers or reminders you want customers to know
- the channels you actually use

Do not start with a full year. Start with two weeks.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need a simple two-week marketing plan that helps me show up consistently without making claims I cannot support.

Here is what I offer:
[list services/products]

Here are common customer questions:
[list questions]

Here are seasonal or timely things that matter right now:
[list if any]

Here are proof points I can safely use:
[reviews, examples, before/after themes, customer outcomes in general terms]

Channels I use:
[Instagram/Facebook/LinkedIn/email/website/etc.]

Please create:
1. A two-week content plan.
2. Post ideas grouped by theme.
3. Draft captions or email blurbs.
4. A simple call to action for each item.
5. A list of anything that needs my approval before posting.

Use this tone:
[plain/helpful/local/professional/warm]

Do not invent results, customer stories, discounts, guarantees, credentials, or availability.

Walkthrough

1. Start a fresh chat.
2. Paste the starter prompt.
3. Fill in your actual services, questions, and channels.
4. Keep the first plan to two weeks.
5. Review the themes before reading the captions.
6. Delete anything that does not sound like your business.
7. Check every claim.
8. Pick the posts you would actually use.
9. Save the best ones in a simple content document.
10. Add posting dates only after the content feels usable.

What Not To Let AI Do Here

Do not let AI invent:

- customer results
- before/after details
- reviews
- discounts
- guarantees
- professional credentials
- scarcity claims
- urgency that is not real

Marketing should make the business easier to understand. It should not create promises you have to clean up later.

Review Checklist

Before using the output, check:

- Does it sound like your business?
- Is the claim true?
- Is the next step clear?
- Would a customer understand what you offer?
- Is anything too polished, too cute, or too vague?
- Did it create a fake testimonial or outcome?
- Can you actually keep up with the plan?

Iteration Prompts

Make this sound more like a real local business and less like marketing copy.

Give me five post ideas based only on customer questions.

Turn this post into a shorter version for Instagram.

Turn this into a short email update for existing customers.

Create a version that is helpful without sounding salesy.

Short Example

Example business: a coffee shop. Instead of asking for "social media content," the owner gives the tool:

- morning rush hours
- new seasonal drink
- parking reminder
- catering option
- two common customer questions
- tone: relaxed, clear, not overly cute

The output becomes more useful because it is tied to real details from the business.

Time ROI

If planning takes 90 minutes every time you sit down, and this helps you get a two-week plan in 30 minutes:

90 minutes - 30 minutes = 60 minutes saved per planning session

Use this to stop rebuilding the same marketing plan from a blank page.

If This Helps

Keep a simple content bank with:

- customer questions
- service reminders
- seasonal notes
- proof you are allowed to use
- posts you edited and liked
- phrases that sound like your business

The next time you plan, paste that bank into the starter prompt.

Newsletter / Email Updates

What This Looks Like

You want to stay in touch with customers, but you do not know what to send. The email list sits there. When you finally write, it takes too long because every update starts from nothing.

Why It Costs You Time

Email updates take time because you have to choose the topic, write the note, avoid sounding pushy, and include a useful next step. A simple structure makes the habit easier.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- who receives the email
- one useful update
- one customer question or reminder
- one offer or next step if appropriate
- anything you should avoid saying

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a simple customer email update.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A short email update.
2. Three subject line options.
3. A shorter version for customers who skim.
4. A clear call to action.
5. A list of anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent discounts, events, deadlines, claims, customer stories, guarantees, or availability.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- fake urgency
- fake customer stories
- discounts you have not approved
- compliance claims
- unsubscribe or email-platform rules

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the update useful?
- Is the subject line honest?
- Did the tool invent a deadline or offer?
- Is the email short enough?
- Is the next step clear?

Iteration Prompts

Make this shorter and more useful.

Create a version for past customers.

Create a version for current customers.

Remove sales pressure.

Give me five useful topics for next month.

Short Example

Example business: a childcare or education-adjacent business. The owner provides a reminder about summer schedules, a common parent question, and a deadline they have confirmed. The tool drafts a clear email that parents can skim quickly.

Time ROI

If this saves 25 minutes each time and you do it 2 times per week:

25 minutes x 2 times = 50 minutes per week

If This Helps

Keep a monthly email note with sections for reminders, questions, seasonal needs, and customer next steps. The next email starts from that note.

Local Event Or Seasonal Promo Planning

What This Looks Like

Seasonal moments and local events create real opportunities, but planning often starts late. By the time you think about the promotion, the event is close and the details are scattered.

Why It Costs You Time

The work includes timing, message, channel, offer, staffing, and follow-up. Organizing those pieces early keeps the window from passing.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: a spreadsheet (examples: Google Sheets, Excel, Numbers)
- optional: a design tool with a free tier (example: Canva Free)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- the event or season
- what customers need during that period
- any offer or reminder
- important dates
- channels you will use
- staffing or inventory constraints

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with planning a local event or seasonal promotion.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A simple promo plan.
2. A timeline with dates to review.
3. Draft copy for email or social.
4. A checklist of materials needed.
5. A list of assumptions to confirm.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent event details, dates, discounts, inventory, partnerships, sponsorships, or deadlines.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- event facts you have not verified
- discounts or inventory
- local partnerships
- legal or permit requirements
- staffing commitments

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Are all dates accurate?
- Is the offer real?
- Can the team handle the promotion?
- Is the message clear?
- Did the tool invent event details?

Iteration Prompts

Turn this into a two-week promotion timeline.

Create a version for email and social.

List what needs to be confirmed before publishing.

Make this simpler for a small team.

Create a day-after follow-up message.

Short Example

Example business: a fitness studio. The owner plans around a January reset offer. The tool builds a two-week plan with email reminders, social posts, and a checklist, while marking pricing and capacity for owner approval.

Time ROI

If this saves 30 minutes each time and you do it 2 times per week:

30 minutes x 2 times = 60 minutes per week

If This Helps

Create a seasonal calendar with the next three moments that matter to your customers. Add rough dates early, then build the details when the time gets closer.

Before/After Story Capture

What This Looks Like

Good work gets done, but the story disappears. You may have photos, notes, a customer quote, or a project result, but it never becomes a useful example for marketing or sales conversations.

Why It Costs You Time

Story capture takes time because you have to reconstruct what changed, what mattered, and what can be shared without exposing private information.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: a design tool with a free tier (example: Canva Free)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- what the customer needed
- what changed
- approved photos or general details
- any quote you have permission to use
- what should stay private

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with turning completed work into a safe before/after story.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A short before/after story.
2. A privacy-safe version without names.
3. A social caption.
4. A list of details I need permission to use.
5. A checklist for future story capture.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent customer quotes, results, names, photos, permission, metrics, or outcomes.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- fake results
- customer permission
- identifying details
- before/after claims without proof
- regulated outcome claims

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Do you have permission to share details?
- Are private details removed?
- Is the story true?
- Did the tool invent a quote or outcome?
- Is the point easy to understand?

Iteration Prompts

Make this story more concrete without adding new facts.

Remove identifying details.

Create a short social post version.

Create a website case-example version.

List what permission I need before using this.

Short Example

Example business: a home-services company. The owner summarizes a drainage issue, the work completed, and the visible improvement. The tool creates a privacy-safe story and flags photos, address details, and customer quote permission for review.

Time ROI

If this saves 20 minutes each time and you do it 2 times per week:

20 minutes x 2 times = 40 minutes per week

If This Helps

Keep a story-capture checklist for completed work: problem, work done, result, photo permission, quote permission, and safe wording.

Quote / Proposal Prep

What This Looks Like

Quotes and proposals take longer than expected. The details may be in notes, texts, photos, a call recap, or your memory. Turning those pieces into a clear scope takes focused time.

Why It Costs You Time

The cost is gathering the details, organizing them, and explaining the scope clearly enough that the customer knows what is included. AI can prepare a review-ready draft from your notes.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- customer need in general terms
- scope notes
- known constraints
- what is included
- what is excluded
- pricing or pricing placeholders
- timeline limits

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with preparing a quote or proposal draft from my notes.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A plain-language scope summary.
2. A proposal draft.
3. A list of missing details.
4. A customer questions list.
5. A review checklist before sending.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent prices, timelines, guarantees, materials, availability, warranties, contract terms, or discounts.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- final price
- contract language
- warranty terms
- legal obligations
- availability
- scope changes

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the scope accurate?
- Are exclusions clear?
- Did the tool invent pricing or timing?
- Are missing details marked?
- Would the customer understand what happens next?

Iteration Prompts

Make this proposal clearer and shorter.

Show me what details are missing before I send it.

Turn this into a customer-friendly scope summary.

Create a version with placeholders for price and timeline.

List assumptions that need review.

Short Example

Example business: an event venue. The owner gathers event date, guest count, room needs, catering notes, and setup limits. The tool drafts a proposal structure and marks price, availability, and contract terms for review.

Time ROI

If this saves 30 minutes each time and you do it 3 times per week:

30 minutes x 3 times = 90 minutes per week

If This Helps

Save a proposal skeleton with sections for scope, exclusions, customer responsibilities, timeline, price placeholder, and next step.

PART 3

Admin And Operations

1. Messy Intake
2. Inbox Triage
3. Scheduling / Appointment Prep
4. Meeting / Call / Job Notes
5. Form Creation
6. Document Cleanup
7. Weekly Owner Recap / Basic Reporting
8. Task Prioritization

Messy Intake

What This Looks Like

Requests arrive through forms, emails, texts, calls, and social messages. Some are complete. Some are missing key details. Some need routing. Intake becomes messy when everything lands in a different shape.

Why It Costs You Time

Messy intake costs time because you have to sort, clarify, and reformat information before the real work can begin. A consistent intake summary makes routing easier.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: a spreadsheet (examples: Google Sheets, Excel, Numbers)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version. Remember: Do not paste sensitive customer records. Summarize only what is needed for routing.

What To Gather First

Gather:

- recent intake examples
- required information
- common missing details
- routing categories
- who handles each type of request

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with creating a cleaner intake summary and missing-information checklist.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A standard intake summary format.
2. A missing-information checklist.
3. Routing categories.
4. A draft clarification message.
5. Anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent customer facts, eligibility, pricing, availability, routing rules, or promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- customer eligibility
- routing exceptions
- sensitive-data handling rules
- final service fit
- pricing or scheduling

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Does the intake format capture what you need?
- Are missing details clear?
- Are routing categories accurate?
- Did the tool invent customer facts?
- Can a team member use it?

Iteration Prompts

Turn this into a reusable intake checklist.

Create a short clarification message for missing details.

Group these requests by routing category.

Show me what information is missing most often.

Make this easier for staff to use.

Short Example

Example business: a real estate agent. The owner summarizes buyer inquiries with budget range, area, timeline, and missing details. The tool creates a standard intake format and a clarification message for incomplete leads.

Time ROI

If this saves 12 minutes each time and you do it 5 times per week:

12 minutes x 5 times = 60 minutes per week

If This Helps

Use one intake format for every channel. Even if requests arrive differently, they can be summarized the same way before the next step.

Inbox Triage

What This Looks Like

Your inbox carries more than email. It is requests, reminders, invoices, newsletters, customer questions, vendor updates, staff notes, scheduling changes, and things you need to deal with later. The hard part is sorting what matters from what can wait. A triage pass can turn the pile into a shorter action list.

Why It Costs You Time

Inbox work costs time because you keep rereading the same messages. You open a message, decide you cannot answer it yet, leave it unread or flag it, and then come back later. By then you have to remember what it was, why it mattered, and what you planned to do. A triage habit helps you separate:

- answer today
- schedule
- delegate
- save for reference
- ignore or unsubscribe
- needs more information

Free Tools Needed

You can do this with:

- your existing email tool (examples: Gmail, Outlook, Apple Mail)
- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- optional: a document or notes app for the action list
- optional: a spreadsheet for tracking open loops

No paid tools are required for this DIY version.

What To Gather First

Do not paste your whole inbox. Choose 5-10 messages that need action. Remove private details, account numbers, payment information, and anything sensitive. For each message, paste only:

- who it is from in general terms
- what they are asking
- any deadline
- what you need to decide
- any reply constraints

Complete Starter Prompt

I run a [type of business].

I am going to paste summaries of several inbox messages. Help me triage them into an action list.

For each message, return:

1. Category: reply, schedule, delegate, save, ignore, or needs more information.
2. Priority: today, this week, later, or no action.
3. Suggested next step.
4. A draft reply only if a reply is needed.
5. Anything that needs my approval.

Do not invent facts, promises, prices, deadlines, policies, or decisions.

Here are the message summaries:
[paste cleaned-up summaries]

Use this tone for any draft replies:
[plain/professional/warm/direct]

Walkthrough

1. Pick a small batch of messages.
2. Summarize or clean them before pasting.
3. Paste the starter prompt.
4. Review the categories first.
5. Move anything that is wrongly prioritized.
6. Check draft replies for accuracy.
7. Copy the action list into your notes.
8. Handle the "today" items before sorting the rest again.

What Not To Let AI Do Here

Do not paste login codes, private records, financial details, legal issues, HR issues, or confidential customer information. Do not let AI decide whether something can be ignored if it involves money, customer commitment, legal risk, employee issues, or a deadline. Remember: triage is preparation. You still decide.

Review Checklist

Before using the action list, check:

- Are urgent items actually urgent?
- Did the tool miss a deadline?
- Did it treat something sensitive too casually?
- Did it draft a reply that promises something you have not approved?
- Are the next steps clear enough to act on?
- Is there anything you should handle personally?

Iteration Prompts

Turn this into a checklist I can work through today.

Show me only the messages that need a reply.

Identify anything that may involve money, legal risk, customer promises, or deadlines.

Make the draft replies shorter.

Create a follow-up list for anything waiting on someone else.

Short Example

Example business: a bookkeeping firm. The owner summarizes six emails:

- client sent missing receipt
- vendor sent software update
- prospect asked about pricing
- existing client asked about a deadline
- newsletter
- bank notice requiring review

The tool can help sort those into action, reference, and low-priority groups. The owner still handles the bank notice and pricing decision directly.

Time ROI

If this saves 15 minutes on inbox sorting each day for 4 days per week:

15 minutes x 4 days = 60 minutes per week

The larger benefit is fewer open loops. You know what needs action and what can wait.

If This Helps

Create a simple inbox triage note with these headings:

- reply today
- waiting on someone else
- schedule
- delegate
- save for reference
- no action

Use the AI tool to prepare the list, then work from your own reviewed version.

Scheduling / Appointment Prep

What This Looks Like

Appointments require more than a time on the calendar. Customers may need prep instructions, reminders, documents, parking notes, reschedule options, or follow-up instructions.

Why It Costs You Time

Scheduling costs time when you repeatedly explain the same details or fix preventable confusion. A prep message reduces back-and-forth.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- your existing calendar tool (examples: Google Calendar, Outlook Calendar, Apple Calendar)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- appointment type
- prep instructions
- arrival details
- documents or links
- reschedule policy
- common customer questions

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with creating appointment prep and reminder messages.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. An appointment confirmation message.
2. A reminder message.
3. A prep checklist.
4. A reschedule reply template.
5. Anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent availability, policies, deadlines, fees, medical instructions, legal instructions, or guarantees.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- appointment availability
- cancellation fees
- medical or legal prep instructions
- policy exceptions
- customer eligibility

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the date/time field left for confirmation?
- Are prep instructions accurate?
- Are links correct?
- Did the tool invent policy language?
- Does the customer know what to do next?

Iteration Prompts

Create a shorter text reminder.

Make this easier to scan.

Create a reschedule reply version.

Show me what information is missing.

Make the tone warmer without adding fluff.

Short Example

Example business: a salon. The owner provides appointment type, arrival time request, parking note, and cancellation reminder. The tool prepares a confirmation message and a shorter reminder.

Time ROI

If this saves 6 minutes each time and you do it 10 times per week:

6 minutes x 10 times = 60 minutes per week

If This Helps

Save prep templates by appointment type. Review them when policies change so old instructions do not keep circulating.

Meeting / Call / Job Notes

What This Looks Like

You finish a call, meeting, or job with useful notes. Then the notes sit in a notebook, phone, email, or text thread. The next steps are clear for a few hours, then the details fade.

Why It Costs You Time

Notes cost time when they have to be reread and translated into actions later. A quick summary can turn rough notes into follow-up, tasks, and decisions.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version. Remember: Remove private customer, employee, medical, legal, or financial details before pasting notes.

What To Gather First

Gather:

- rough notes or transcript excerpt
- who needs follow-up
- decisions made
- open questions
- deadlines or next steps

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with turning rough notes into action items and follow-up.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A short summary.
2. Action items with owners if known.
3. Open questions.
4. A follow-up message draft.
5. Anything that needs my review.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent decisions, owners, deadlines, customer promises, pricing, or facts not in the notes.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- final decisions that were not made
- deadlines not stated
- customer commitments
- legal or HR conclusions
- private details in shared summaries

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Are action items accurate?
- Are owners correct or marked unknown?
- Did the tool invent a deadline?
- Is private information removed?
- Is the follow-up message ready for review?

Iteration Prompts

Turn this into a task list.

Show me only open questions.

Draft a follow-up email from these notes.

Mark anything that was assumed.

Create a version I can share with the team.

Short Example

Example business: a contractor. After a site visit, the owner pastes cleaned-up notes about measurements, customer questions, and next steps. The tool turns them into a summary, missing details, and a follow-up draft.

Time ROI

If this saves 15 minutes each time and you do it 4 times per week:

15 minutes x 4 times = 60 minutes per week

If This Helps

Use the same note format after every call or job: summary, decisions, tasks, open questions, and follow-up.

Form Creation

What This Looks Like

You need a form, checklist, intake sheet, or request template. You know what information you need, but turning it into clear questions takes time.

Why It Costs You Time

Forms cost time when they ask the wrong questions or make customers guess what you need. A good first draft helps you collect cleaner information.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- what the form is for
- who will fill it out
- required information
- optional information
- what should not be collected
- where the answers go

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a simple form or request template.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A form title and purpose.
2. Clear questions grouped by section.
3. Required and optional fields.
4. A short intro for the person filling it out.
5. A review list for sensitive fields.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent legal requirements, required fields, privacy rules, eligibility rules, or policies.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- legal consent language
- privacy policy decisions
- medical or financial intake requirements
- required fields without review
- how long to retain records

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Does every question have a reason?
- Are sensitive fields avoided or reviewed?
- Is the form short enough?
- Would the customer understand it?
- Does the team get what it needs?

Iteration Prompts

Make this form shorter.

Group these questions by topic.

Mark which fields should be required.

Remove questions that may be too sensitive.

Create a customer-friendly intro.

Short Example

Example business: a nonprofit. The director needs a volunteer interest form. The tool turns rough notes into sections for contact info, availability, skills, interests, and follow-up, while flagging sensitive questions for review.

Time ROI

If this saves 25 minutes each time and you do it 1 times per week:

25 minutes x 1 times = 25 minutes per week

If This Helps

Keep a form library for intake, feedback, event signups, requests, and internal checklists. Reuse the structure when a new form is needed.

Document Cleanup

What This Looks Like

You have a document that is outdated, too long, confusing, or hard to use. It may be a policy, handout, instruction sheet, website page, email template, or customer guide.

Why It Costs You Time

Document cleanup takes time because you have to separate what is still true from what is clutter. A cleanup pass can simplify the language and flag sections that need review.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- the document or excerpt
- who uses it
- what needs to change
- known outdated sections
- tone you want
- anything the tool should not alter

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with cleaning up and simplifying a business document.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A clearer version of the document.
2. A list of unclear or outdated sections.
3. A shorter summary version.
4. A checklist of facts to verify.
5. Anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent policies, legal language, pricing, timelines, requirements, or facts.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- policy changes
- legal wording
- compliance language
- pricing updates
- facts not in the source document

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the meaning preserved?
- Did the tool change a policy?
- Are outdated sections flagged?
- Is the language easier to read?
- Does someone need to approve it?

Iteration Prompts

Make this shorter without changing the meaning.

List every place where the document is unclear.

Create a plain-English version.

Mark facts I need to verify.

Turn this into a one-page handout.

Short Example

Example business: a retail shop. The owner pastes an outdated return-policy handout. The tool rewrites it in clearer language and flags refund windows, exceptions, and final policy language for owner review.

Time ROI

If this saves 30 minutes each time and you do it 1 times per week:

30 minutes x 1 times = 30 minutes per week

If This Helps

Keep a document review list. Start with the documents customers or staff use most often, then update one at a time.

Weekly Owner Recap / Basic Reporting

What This Looks Like

You reach the end of the week with a lot of loose pieces. Leads. Customer issues. Invoices. Jobs finished. Jobs waiting. Staff questions. Marketing tasks. Decisions you meant to make. The information exists somewhere, but it is spread across your inbox, calendar, notes, spreadsheet, messages, and memory. A rough list can become a weekly owner recap.

Why It Costs You Time

Without a recap, the same questions keep floating around:

- What did we not finish?
- Who needs a reply?
- What should happen next week?
- What is waiting on me?
- What problem keeps repeating?

The cost includes the time spent answering those questions and the mental load of carrying them.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a notes document or spreadsheet
- your existing calendar, inbox, CRM notes, job notes, or task list

No paid tools are required for this DIY version.

What To Gather First

Gather a rough weekly dump. Use bullets. Do not over-organize it before using the tool. Include:

- wins
- open leads
- customer issues
- unpaid invoices or payment reminders
- jobs or projects in progress
- decisions needed
- tasks waiting on someone else
- things that kept repeating
- next-week deadlines

Remove private details before pasting.

Complete Starter Prompt

I run a [type of business].

I am going to paste rough notes from this week. Help me turn them into a weekly owner recap.

Please create:

1. A short summary of the week.
2. Open loops that need attention.
3. Decisions I need to make.
4. Follow-ups due next week.
5. Repeated problems or patterns.
6. A short priority list for next week.

Do not invent facts, numbers, deadlines, customer promises, or financial conclusions.

Mark anything that needs my review.

Here are the rough notes:
[paste cleaned-up weekly notes]

Walkthrough

1. Gather notes from the week.
2. Remove sensitive details.
3. Paste the starter prompt.
4. Read the open loops first.
5. Add anything the tool missed.
6. Check the priority list against real deadlines.
7. Copy the final recap into a weekly notes document.
8. Start next week from that list.

What Not To Let AI Do Here

Do not let AI make financial conclusions from incomplete notes. Do not let it decide what matters most if there are customer promises, cash issues, employee concerns, legal questions, or deadlines involved. Use the recap to see the week more clearly. Keep the decisions with you.

Review Checklist

Before using the recap, check:

- Did it miss any urgent item?
- Did it invent a number, deadline, or conclusion?
- Are customer follow-ups clear?
- Are next-week priorities realistic?
- Does anything need to be removed for privacy?
- Does the recap help you decide what to do next?

Iteration Prompts

Turn this into a Monday priority list.

Show me only the open loops and who owns each one.

Identify repeated problems that may need a process fix.

Make this shorter and easier to scan.

Create a version I can share with my team without private details.

Short Example

Example business: a fitness studio. The owner pastes rough notes:

- two trial members need follow-up
- one instructor requested schedule change
- three unpaid invoices
- Saturday class was full
- website form sent two incomplete inquiries
- equipment repair needed

The recap groups the notes into follow-up, scheduling, money, operations, and next-week priorities.

Time ROI

If this saves 30 minutes at the end of each week:

30 minutes x 1 recap = 30 minutes per week

The bigger value may be starting Monday with fewer loose ends.

If This Helps

Make the weekly recap a simple Friday or Monday habit. Keep the same headings every week:

- wins
- open loops
- follow-ups
- decisions
- repeated problems
- next-week priorities

The format matters less than the habit.

Task Prioritization

What This Looks Like

You have too many tasks and no clear order. Some are urgent, some are important, some are noise, and some are waiting on someone else.

Why It Costs You Time

Task lists cost time when everything looks equally important. A sorting pass can turn a rough list into today, this week, waiting, delegate, and later.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: a spreadsheet (examples: Google Sheets, Excel, Numbers)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- your task list
- deadlines
- customer commitments
- money-related items
- what only you can do
- what can wait

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with sorting a task list into a practical priority order.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A today list.
2. A this-week list.
3. Items waiting on someone else.
4. Items to delegate if possible.
5. Questions I need to answer before prioritizing.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent deadlines, commitments, urgency, business consequences, or customer promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- customer commitments
- cash priorities
- legal or HR priority
- what can be ignored
- deadlines that were not given

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Are real deadlines correct?
- Are customer promises visible?
- Did the tool treat a serious issue too lightly?
- Is today's list realistic?
- What can wait?

Iteration Prompts

Make today's list smaller and more realistic.

Show me anything related to customers or money.

Sort this by urgent, important, waiting, and later.

Identify what only I can do.

Turn this into a Monday plan.

Short Example

Example business: a small catering business. The owner pastes a rough list of event prep, invoices, staffing, shopping, and customer replies. The tool groups it into today, this week, waiting, and owner-only decisions.

Time ROI

If this saves 12 minutes each time and you do it 5 times per week:

12 minutes x 5 times = 60 minutes per week

If This Helps

Use the same priority headings every week: today, this week, waiting, delegate, later, and owner decision.

PART 4

Team And Process

1. Staff Checklists / Process Docs
2. Handoff Clarity
3. New Employee Onboarding
4. Hiring Post / Role Clarity
5. Interview Questions
6. Performance Feedback Drafting
7. Internal Announcements

Staff Checklists / Process Docs

What This Looks Like

A lot of small-business process lives in the owner's head. How to open. How to close. How to answer a common question. How to prepare for a job. How to clean up after an appointment. How to handle a handoff. How to know when something needs the owner. The process may be obvious to you because you have done it for years. It is not always obvious to the next person. Your rough notes can become a checklist or process doc.

Why It Costs You Time

When the process is not written down, the owner becomes the backup system. People ask the same questions. Steps get skipped. Training takes longer. Quality depends on who happens to be working that day. A checklist does not have to be fancy. It needs to be clear enough that someone can do the work with fewer interruptions.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: photos, existing notes, or examples you already use

No paid tools are required for this DIY version.

What To Gather First

Pick one process. Do not start with the whole business. Choose something repeated and concrete:

- opening checklist
- closing checklist
- new customer setup
- appointment prep
- job cleanup
- order packing
- weekly admin review
- handoff from sales to service

Write rough notes in the order you usually do the work. Messy is fine.

Complete Starter Prompt

I run a [type of business].

I need to turn a process that currently lives in my head into a clear checklist for [staff/team member/contractor].

Process name:
[name]

Who will use it:
[role or person type]

Rough steps:
[paste rough notes]

Important rules or owner preferences:
[paste rules]

Things that should be escalated to the owner:
[paste examples]

Please create:

1. A clean step-by-step checklist.
2. A short purpose statement.
3. A list of materials, tools, or information needed.
4. A "stop and ask" section for anything that should not be guessed.
5. A shorter quick-reference version.

Use plain language. Do not invent policies, safety rules, legal requirements, or customer promises.

Mark anything that needs owner approval.

Walkthrough

1. Pick one process.
2. Write rough steps without worrying about formatting.
3. Paste the starter prompt.
4. Review the order of steps first.
5. Add anything the tool missed.
6. Remove anything that is not how you actually work.
7. Check the "stop and ask" section.
8. Give the checklist to one person to try.
9. Update it after they use it.

What Not To Let AI Do Here

Do not let AI invent safety rules, legal requirements, HR policies, customer promises, or technical procedures you have not approved. For safety-sensitive work, use the tool to organize your own process. Do not use it as the source of the process.

Review Checklist

Before using the checklist, check:

- Are the steps in the right order?
- Would a newer person understand it?
- Is anything missing that you normally do automatically?
- Does it explain when to stop and ask?
- Does it include private or sensitive information that should be removed?
- Is the checklist short enough to use during real work?

Iteration Prompts

Make this easier for a new employee to follow without making it childish.

Add a "stop and ask the owner" section.

Turn this into a one-page checklist.

Show me where the instructions are unclear.

Create a version for someone who already knows the basics.

Short Example

Example business: a cleaning company. The owner writes rough notes for a job-closeout process:

- check rooms
- take photos if needed
- note supplies used
- message customer if something was different
- load equipment
- update job status

The tool turns those notes into a checklist with a "stop and ask" section for damage, customer complaints, missing access, or anything outside the normal scope.

Time ROI

If a written checklist prevents 2 owner interruptions per week, and each interruption costs 10 minutes:

2 interruptions x 10 minutes = 20 minutes per week

That may sound small. Across several repeated processes, it can become real owner time.

If This Helps

Create a folder called something like **How We Do Things**. Start with three documents:

- opening or prep checklist

- customer handoff checklist
- owner escalation list

Improve them as the team uses them. A process doc is useful when it reflects the real work, not when it looks perfect.

Handoff Clarity

What This Looks Like

Work moves from one person to another, and details get dropped. A lead moves to service. A job moves to billing. A customer request moves from the owner to a team member.

Why It Costs You Time

Handoffs cost time when the receiving person has to ask for missing context. A simple handoff note reduces repeated questions and prevents dropped work.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)
- optional: a spreadsheet (examples: Google Sheets, Excel, Numbers)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- the handoff situation
- what the next person needs to know
- customer or job status in general terms
- open questions
- deadline or next step

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with creating a clear handoff note and checklist.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A handoff summary.
2. A checklist of required information.
3. Open questions.
4. Next steps.
5. A short message to the receiving person.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent customer facts, commitments, deadlines, pricing, ownership, or decisions.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- final ownership if unclear
- customer promises
- deadlines not confirmed
- private details in broad team messages
- policy decisions

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Does the receiving person know what to do?
- Are open questions marked?
- Did the tool invent a deadline?
- Is private information limited?
- Is the next step clear?

Iteration Prompts

Make this handoff easier for a busy team member to scan.

Create a version for internal chat.

List missing details before this can be handed off.

Turn this into a recurring handoff checklist.

Make this more direct.

Short Example

Example business: a home-services company. A sales call needs to move to the technician. The owner summarizes the customer need, location area, photos received, and open questions. The tool creates a technician handoff note.

Time ROI

If this saves 10 minutes each time and you do it 5 times per week:

10 minutes x 5 times = 50 minutes per week

If This Helps

Save a handoff template with five fields: customer need, current status, next step, open questions, and owner review needed.

New Employee Onboarding

What This Looks Like

New employees learn by shadowing, asking questions, and picking up habits as they go. That can work, but it puts a lot of training load on the owner or senior staff.

Why It Costs You Time

Onboarding costs time when every new person has to be taught from scratch. A simple onboarding plan helps you cover the basics in a more consistent order.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version. Remember: Do not use AI as the source for HR, legal, payroll, or safety requirements. Use it to organize your own approved information.

What To Gather First

Gather:

- role basics
- first-week tasks
- tools or accounts needed
- policies to review
- training steps
- who answers questions

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with creating a simple new employee onboarding plan.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A first-day checklist.
2. A first-week training outline.
3. A list of documents or tools needed.
4. A questions-to-ask section.
5. Anything that needs HR or owner approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent HR policy, payroll rules, legal requirements, safety requirements, benefits, or employee promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- employment policy
- legal requirements
- pay or benefits details
- safety procedure source material
- performance decisions

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Does this reflect how you actually train?
- Are HR or legal items marked for review?
- Are account/tool steps accurate?
- Is the first week realistic?
- Does the new person know who to ask?

Iteration Prompts

Make this easier for a first-week employee to follow.

Create a manager checklist version.

Mark anything that needs HR or owner review.

Turn this into a 30-day onboarding outline.

Remove anything that sounds too corporate.

Short Example

Example business: a coffee shop. The owner lists opening basics, register training, drink station shadowing, cleaning expectations, and who supervises each shift. The tool organizes it into a first-week onboarding plan.

Time ROI

If this saves 45 minutes each time and you do it 1 times per week:

45 minutes x 1 times = 45 minutes per week

If This Helps

Keep one onboarding plan per role. Update it after each new hire with the questions they asked most often.

Hiring Post / Role Clarity

What This Looks Like

Hiring starts with a feeling: you need help. Turning that into a clear role is harder. You need to explain the work, schedule, expectations, must-haves, and what success looks like.

Why It Costs You Time

Unclear roles attract the wrong applicants and create extra back-and-forth. A clearer post helps people self-select before you spend time interviewing.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version. Remember: Employment postings may need legal or HR review depending on your business and location.

What To Gather First

Gather:

- role title
- work the person will do
- schedule
- must-have requirements
- nice-to-haves
- pay range if approved
- what you should not include

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a clear hiring post and role summary.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A plain-English role summary.
2. A hiring post draft.
3. Required and preferred qualifications.
4. A list of unclear role details.
5. Anything that needs legal, HR, or owner approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent pay, benefits, legal requirements, job duties, qualifications, schedule, or employment promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- legal compliance
- pay or benefits decisions
- employment promises
- protected-class language
- role requirements you have not approved

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the role clear?
- Are must-haves truly required?
- Did the tool invent pay or benefits?
- Is the language fair and practical?
- Should HR or legal review it?

Iteration Prompts

Make this clearer and less corporate.

Separate must-have from nice-to-have qualifications.

List what is missing before we post this.

Create a shorter version for social media.

Make this sound like a real small business.

Short Example

Example business: a salon. The owner lists front-desk tasks, schedule needs, customer-service expectations, and training basics. The tool drafts a role post and flags pay, benefits, and legal language for approval.

Time ROI

If this saves 35 minutes each time and you do it 1 times per week:

35 minutes x 1 times = 35 minutes per week

If This Helps

Save a role-clarity worksheet before writing any post: work needed, schedule, must-haves, training, pay approval, and interview questions.

Interview Questions

What This Looks Like

Interviews can drift into casual conversation. You may get a feel for the person but still miss whether they can do the work, handle common situations, and communicate well.

Why It Costs You Time

Interview prep costs time because you have to turn the role into fair, useful questions. A structured question list makes interviews easier to compare.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version. Remember: Interview questions can create legal risk. Review questions before using them and avoid protected or irrelevant personal topics.

What To Gather First

Gather:

- role summary
- important tasks
- common situations
- must-have skills
- values or work habits that matter
- topics to avoid

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with creating practical interview questions for a role.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. Interview questions grouped by topic.
2. A short scorecard.
3. Work-sample or scenario questions.
4. Questions to avoid or review.
5. Anything needing HR or legal approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent legal guidance, role requirements, protected-topic questions, pay, benefits, or employment promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- legal compliance decisions
- questions about protected personal information
- final hiring judgment
- background-check rules
- pay or benefits commitments

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Are questions tied to the job?
- Are any questions risky or irrelevant?
- Can answers be compared fairly?
- Did the tool invent requirements?
- Does this need HR review?

Iteration Prompts

Make these questions more practical.

Create scenario questions based on common customer situations.

Remove any question that may be inappropriate or risky.

Turn this into a simple interview scorecard.

Create a shorter 30-minute interview version.

Short Example

Example business: a retail shop. The owner provides the role tasks and common customer situations. The tool creates questions about handling busy periods, inventory basics, and customer service while flagging any risky topics.

Time ROI

If this saves 25 minutes each time and you do it 2 times per week:

25 minutes x 2 times = 50 minutes per week

If This Helps

Keep a question bank by role. After interviews, save questions that helped you understand the candidate's real fit.

Performance Feedback Drafting

What This Looks Like

Feedback is hard to write clearly and fairly. You may need to address attendance, communication, quality, customer issues, teamwork, or follow-through.

Why It Costs You Time

Feedback takes time because wording matters. You need to be specific, fair, and calm. A draft can help you organize the issue before a conversation.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)

No paid tools are required for this DIY version. Remember: Employee feedback can involve HR and legal risk. Do not paste private discipline details. Review before using.

What To Gather First

Gather:

- the issue in neutral terms
- specific examples
- what expectation applies
- what needs to change
- next step or meeting plan
- what should stay private

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting clear employee feedback for review.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A neutral summary of the issue.
2. A feedback conversation outline.
3. A written draft if needed.
4. Questions to answer before using it.
5. Anything that needs HR or owner review.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent facts, policy, discipline, legal conclusions, employee intent, consequences, or promises.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- disciplinary decisions
- legal conclusions
- employee intent
- HR policy
- termination decisions
- private details in shared documents

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the feedback specific?
- Are facts separated from assumptions?
- Did the tool invent policy or consequences?
- Is the tone calm?
- Should HR or legal review this?

Iteration Prompts

Make this more neutral and specific.

Remove assumptions about intent.

Turn this into a conversation outline.

List questions I should answer before using this.

Make this shorter and clearer.

Short Example

Example business: a fitness studio. The owner summarizes missed class-prep steps and customer confusion without naming private details. The tool prepares a calm conversation outline and marks consequences for owner review.

Time ROI

If this saves 20 minutes each time and you do it 2 times per week:

20 minutes x 2 times = 40 minutes per week

If This Helps

Save a feedback prep format: facts, expectation, impact, change needed, next step, and review needed.

Internal Announcements

What This Looks Like

The team needs an update. A policy changes, a schedule shifts, a customer process changes, or a new tool is being used. If the message is unclear, people ask follow-up questions.

Why It Costs You Time

Internal updates cost time when they are too vague or too long. A clear announcement tells the team what changed, why it matters, and what to do next.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- what changed
- who needs to know
- when it starts
- what action is required
- where questions should go
- anything not finalized

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a clear internal team announcement.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A short announcement.
2. A bullet list of what changed.
3. A team action checklist.
4. A questions section.
5. Anything that needs owner approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent policies, dates, responsibilities, customer promises, HR details, or decisions.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- policy decisions
- HR announcements without review
- deadlines not confirmed
- customer promises
- who is responsible if unclear

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Does the team know what changed?
- Is the start date clear?
- Is the required action clear?
- Did the tool invent a policy?
- Who answers questions?

Iteration Prompts

Make this shorter for an internal chat message.

Create a version for email.

Turn this into a checklist.

List what is unclear before we send it.

Make this firm but not harsh.

Short Example

Example business: a restaurant. The owner needs to announce a new closing checklist. The tool drafts a short team message, a checklist, and a reminder about where to ask questions.

Time ROI

If this saves 12 minutes each time and you do it 3 times per week:

12 minutes x 3 times = 36 minutes per week

If This Helps

Keep an internal update format: what changed, who it affects, when it starts, what to do, and where to ask questions.

PART 5

Money And Vendor Communication

1. Invoice / Payment Follow-Up
2. Price Increase Communication
3. Vendor Email Drafting
4. Expense / Bookkeeping Prep Notes
5. Decision Support / Vendor Comparison

Invoice / Payment Follow-Up

What This Looks Like

Payment reminders can feel awkward. You need to be clear without sounding hostile. You may also need to keep a record of what was sent and when.

Why It Costs You Time

Payment follow-up costs time because tone and accuracy matter. A prepared draft helps you avoid either being too vague or too sharp.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)
- optional: a spreadsheet (examples: Google Sheets, Excel, Numbers)

No paid tools are required for this DIY version. Remember: Do not paste account numbers, bank details, or private financial records into an AI tool.

What To Gather First

Gather:

- invoice status in general terms
- amount if needed and safe to include
- due date
- payment options
- previous reminders
- policy language already approved

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a payment follow-up message.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A polite payment reminder.
2. A firmer follow-up version.
3. A short text version.
4. A checklist of facts to verify.
5. Anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent amounts, due dates, fees, payment terms, legal threats, policy, or account details.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- legal threats
- late fees not approved
- payment terms
- collections decisions
- private account details

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the amount correct?
- Is the due date correct?
- Did the tool invent a fee or threat?
- Is the tone professional?
- Is the payment method accurate?

Iteration Prompts

Make this polite and direct.

Create a firmer version without legal threats.

Make this under 500 characters for text.

List facts I should verify before sending.

Remove anything that sounds accusatory.

Short Example

Example business: a bookkeeping firm. The owner provides invoice number, due date, and approved payment link. The tool drafts a short reminder and a firmer second reminder without adding fees or threats.

Time ROI

If this saves 10 minutes each time and you do it 4 times per week:

10 minutes x 4 times = 40 minutes per week

If This Helps

Save three approved reminder levels: friendly, direct, and final internal-review version. Track when each one is sent.

Price Increase Communication

What This Looks Like

You need to explain a price change carefully. Customers need the facts, the effective date, what changes, and what stays the same.

Why It Costs You Time

Price increase messages take time because you want to be clear without over-explaining or apologizing too much. A draft helps you organize the message before sending.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- what price is changing
- effective date
- who is affected
- what stays the same
- reason you are comfortable sharing
- questions customers may ask

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a clear price increase message.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A customer email.
2. A shorter text or notice version.
3. A FAQ for likely questions.
4. A list of details to confirm.
5. Anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent prices, dates, reasons, discounts, exceptions, guarantees, or policies.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- final pricing
- special exceptions
- legal or contract interpretation
- customer eligibility
- discounts not approved

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Are prices and dates accurate?
- Is the message clear?
- Did the tool invent a reason or exception?
- Does the customer know what happens next?
- Should any customers receive a different message?

Iteration Prompts

Make this more direct and less apologetic.

Create a shorter version for a notice.

Create an FAQ for customer questions.

Remove anything that overexplains.

Make this warmer without sounding uncertain.

Short Example

Example business: a cleaning company. The owner provides the new recurring-service price, effective date, and what is unchanged. The tool drafts a clear customer note and flags exceptions for review.

Time ROI

If this saves 30 minutes each time and you do it 1 times per week:

30 minutes x 1 times = 30 minutes per week

If This Helps

Save the final price-change message and the FAQ. Use the FAQ to answer replies consistently.

Vendor Email Drafting

What This Looks Like

Vendor emails can pile up. You may need to ask for pricing, clarify an invoice, check timing, request a correction, or follow up on a missing answer.

Why It Costs You Time

The time cost is making the ask clear. Vague vendor emails create more back-and-forth. A clear draft can get the issue moving faster.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- your existing email or messaging tool (examples: Gmail, Outlook, Apple Mail, text messages)

No paid tools are required for this DIY version.

What To Gather First

Gather:

- who the vendor is in general terms
- what you need
- relevant order, invoice, or request details
- deadline if real
- what outcome you want

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with drafting a clear vendor email.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A concise vendor email.
2. A subject line.
3. A bullet list of requested information.
4. A follow-up version.
5. Anything that needs approval.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent invoice details, contract terms, deadlines, pricing, commitments, or legal claims.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- contract interpretation
- legal threats
- payment commitments
- deadlines not confirmed
- vendor facts not provided

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Is the ask clear?
- Are invoice or order details correct?
- Did the tool invent terms?
- Is the tone professional?
- Is the deadline real?

Iteration Prompts

Make this shorter and more direct.

Make the ask clearer in bullet points.

Create a follow-up if they do not respond.

Remove any legal-sounding language.

Create a firmer version that stays professional.

Short Example

Example business: an event venue. The owner needs updated rental pricing from a vendor. The tool drafts a concise email with the date needed, requested details, and a clear next step.

Time ROI

If this saves 8 minutes each time and you do it 5 times per week:

8 minutes x 5 times = 40 minutes per week

If This Helps

Keep vendor email templates for pricing request, invoice question, delivery timing, correction request, and follow-up.

Expense / Bookkeeping Prep Notes

What This Looks Like

Bookkeeping questions show up later, when receipts, categories, notes, and context are harder to remember. You may know what an expense was for, but the note never gets written down.

Why It Costs You Time

Expense prep costs time when you have to reconstruct the reason for purchases or explain unclear transactions to a bookkeeper. Cleaner notes make handoff easier.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or notes app (examples: Google Docs, Word, Apple Notes, Notion free)
- optional: a spreadsheet (examples: Google Sheets, Excel, Numbers)

No paid tools are required for this DIY version. Remember: Do not paste bank account numbers, card numbers, tax documents, or private financial records into an AI tool.

What To Gather First

Gather:

- expense descriptions in general terms
- possible categories
- business purpose
- questions for the bookkeeper
- receipts or records kept outside the AI tool

Keep the material short. Remove names, private details, account numbers, and anything the tool does not need.

Complete Starter Prompt

I run a [type of business] serving [type of customer].

I need help with turning expense notes into a cleaner bookkeeping handoff.

Business context:

[briefly describe your business, customer, and situation]

Source material:

[paste or summarize the cleaned-up material]

Please create:

1. A categorized expense-notes table.
2. Questions for my bookkeeper.
3. Items needing receipts or clarification.
4. A short handoff summary.
5. Anything that needs review.

Use this tone:

[plain/friendly/professional/direct/warm]

Do not invent tax treatment, deductions, account numbers, categories, amounts, or financial advice.

Mark anything that needs my approval before I use it.

If important information is missing, list the questions I should answer before using the output.

Walkthrough

1. Start a fresh chat in a free AI chat tool.
2. Paste the complete starter prompt.
3. Replace the bracketed sections with your business details.
4. Paste only the cleaned-up material needed for this task.
5. Read the summary, list, or first section before using the full output.
6. Correct any wrong assumptions.
7. Check anything the tool marked for approval.
8. Edit the result until it sounds like your business.
9. Save the useful version somewhere you can find again.

What Not To Let AI Do Here

Do not let AI decide:

- tax advice
- deduction decisions
- final accounting categories
- account details
- financial conclusions

Use the tool to prepare the work. Keep the business decision with you.

Review Checklist

Before using the output, check:

- Are amounts kept out unless needed and safe?
- Are questions for the bookkeeper clear?
- Did the tool give tax advice?
- Are uncertain categories marked uncertain?
- Are receipts tracked outside the tool?

Iteration Prompts

Turn this into a table for my bookkeeper.

Mark anything that needs a receipt.

List questions I should ask before categorizing.

Remove anything that sounds like tax advice.

Make the handoff summary shorter.

Short Example

Example business: a small contractor. The owner summarizes purchases for supplies, fuel, software, and client materials without bank details. The tool creates a bookkeeping handoff and marks unclear categories for the bookkeeper.

Time ROI

If this saves 20 minutes each time and you do it 2 times per week:

$20 \text{ minutes} \times 2 \text{ times} = 40 \text{ minutes per week}$

If This Helps

Keep a monthly bookkeeping prep note with sections for expenses, missing receipts, questions, and owner review. Share only the reviewed version.

Decision Support / Vendor Comparison

What This Looks Like

You need to choose between options. A new vendor. A scheduling tool. A point-of-sale system. A contractor. A marketing idea. A lease option. A piece of equipment. A service package. Even a medium-size decision takes time. You compare prices, features, risks, timing, support, and the way each option fits your business. A comparison table can keep you from holding every factor in your head.

Why It Costs You Time

Business decisions often get messy because the information arrives in different formats. One vendor sends a PDF. Another sends an email. A third has a pricing page. You have notes from a call, a few concerns, and a deadline. The first useful step is turning scattered information into a comparison table and question list.

Free Tools Needed

You can do this with:

- a free AI chat tool (examples: ChatGPT, Claude, Gemini, Copilot)
- a document or spreadsheet (examples: Google Docs, Google Sheets, Word, Excel, Numbers)
- vendor notes, public pricing pages, emails, or your own summaries

No paid tools are required for this DIY version.

What To Gather First

Gather the options you are comparing. For each option, summarize:

- cost
- what is included
- contract length
- setup time
- support
- known limitations
- questions you still have
- what matters most to your business

If any material is confidential, summarize it instead of pasting it.

Complete Starter Prompt

I run a [type of business].

I need help comparing options for [decision].

My priorities are:

[list priorities, such as cost, reliability, support, speed, ease of use, customer experience]

Here are the options:

[paste cleaned-up notes for each option]

Please create:

1. A comparison table.
2. Pros and cons for each option.
3. Questions I should ask before deciding.
4. Risks or tradeoffs to review.
5. A short summary of which option seems strongest based only on the information provided.

Do not invent prices, terms, guarantees, reviews, contract language, or facts.

If information is missing, mark it as missing instead of guessing.

Walkthrough

1. Write down what decision you are making.
2. List what matters most before pasting vendor information.
3. Paste cleaned-up notes for each option.
4. Review the comparison table for accuracy.
5. Add missing costs, terms, or constraints.
6. Read the questions list.
7. Ask vendors those questions if needed.
8. Make the decision yourself after the comparison is clear.

What Not To Let AI Do Here

Do not let AI make the final decision for you. Do not rely on it for legal interpretation, contract review, tax advice, financial advice, or technical claims that need expert review. Use it to organize what you know and expose what you still need to ask.

Review Checklist

Before relying on the comparison, check:

- Are all prices and terms accurate?
- Did the tool mark missing information?
- Did it invent reviews, claims, or guarantees?
- Are the tradeoffs specific?
- Are your real priorities reflected?
- Is there anything a professional should review?
- Do you have enough information to decide?

Iteration Prompts

Show me the missing information for each option.

Create a vendor question list before I decide.

Compare these options based on my priorities only.

Make the tradeoffs more concrete.

Turn this into a one-page decision memo.

Short Example

Example business: an event venue. The owner is comparing three booking tools. The notes include monthly cost, setup fee, calendar sync, customer reminders, contract support, and payment options. The tool creates a table and flags missing details: cancellation terms, support response time, payment fees, and whether old bookings can be imported. The owner still decides. The comparison makes the decision less foggy.

Time ROI

If this saves 45 minutes of rereading notes and rebuilding comparisons:

45 minutes x 1 decision = 45 minutes saved

The value is more than speed. A clearer comparison can help you avoid choosing before you have the right questions answered.

If This Helps

Save a decision template with these headings:

- decision
- options
- priorities
- known costs
- missing information
- risks
- questions to ask
- final decision

Use the same template the next time you compare vendors, tools, services, or business choices.

Glossary

AI Chat Tool

A tool you can type instructions into and receive a written response. Examples include ChatGPT, Claude, Gemini, and Copilot.

Starter Prompt

The first full instruction you give the AI tool. A good starter prompt includes context, the task, source material, limits, tone, and the format you want back.

Complete Starter Prompt

A starter prompt that includes enough context to be useful in a normal free AI tool, without a custom setup, saved memory, or extra software.

Iteration

The process of improving the first output. You might ask for a shorter version, a clearer version, more questions, a different format, or a list of assumptions.

Output

The draft, list, table, checklist, summary, or plan the AI tool gives back.

Workflow

A repeated set of steps. For example: lead comes in, you summarize it, draft a reply, review it, send it, save the next follow-up.

Guardrail

A limit you set so the tool does not do the wrong job. Common guardrails include "do not invent prices," "mark anything that needs approval," and "ask questions if information is missing."

Prompt Library

A simple place where you save prompts and edited examples that worked. This can be a document, note, spreadsheet, or folder.

Sensitive Information

Information you should not paste into an AI tool unless you fully understand the privacy setting and risk. This can include payment details, private customer records, employee issues, legal facts, tax documents, passwords, and account numbers.

Review Checklist

A short list you use before relying on an AI output.

Human Approval

The point where you review the output and decide what can actually be used.

Free Tier

The no-cost version of a tool. Free tiers may have usage limits or fewer features, but they are enough for many basic drafting, organizing, and planning tasks.

Use Case

A specific job you want the tool to help with, such as drafting lead follow-up, sorting inbox items, building a checklist, or comparing vendors.

Repeatable Process

A task you can do the same basic way more than once. Repeatable processes are good candidates for saved prompts, checklists, and simple tracking.

Tool Category

The type of tool you need, rather than the specific company that makes it. This guide uses categories first so you can use the free tools you already prefer.

Human-Reviewed

Checked by a person before use. Customer messages, staff communication, pricing, policy, and sensitive decisions should stay human-reviewed.

Time ROI

A simple estimate of whether a habit saves enough time to be worth repeating. It is a guide, not a promise.

Tool Appendix

Use tool categories first. Specific tools change, free-tier limits change, and different owners prefer different apps.

The examples below are starting points. You do not need all of them. For most chapters, you need one free AI chat tool plus the documents, spreadsheets, email, calendar, notes, or recording tools you already use.

Before choosing a new tool, ask:

- Do I already have something that does this well enough?
- Will the free tier let me try the habit before paying?
- Can I export or copy the output somewhere I control?
- Am I comfortable with the privacy settings for this kind of information?

Quick Tool Choices

If you need to...	Start with this category	Example free or free-tier tools
Draft replies, summarize notes, build checklists, compare options	AI chat tool	ChatGPT, Claude, Gemini, Copilot
Save prompts, edited examples, policies, checklists, and drafts	Document or notes tool	Google Docs, Word, Apple Notes, Notion free
Track leads, follow-up dates, vendors, tasks, or recurring reports	Spreadsheet tool	Google Sheets, Excel, Numbers
Capture requests in a cleaner format	Form tool	Google Forms, Microsoft Forms
Dictate notes or turn a meeting into text	Transcription or meeting note tool	Apple Voice Memos, Google Recorder, Google Docs voice typing, Fathom, Fireflies, Otter
Turn approved copy into simple visuals	Design tool with a free tier	Canva Free, Adobe Express, Microsoft Designer, Google Slides
Send, schedule, remind, and find communication history	Email and calendar tool	Gmail, Outlook, Apple Mail, Google Calendar, Outlook Calendar

AI Chat Tools

Category: AI chat assistant.

Examples with free access or free tiers: ChatGPT, Claude, Gemini, Copilot.

Use for:

- drafting
- summarizing
- organizing
- turning notes into checklists
- comparing options
- creating first-pass plans

Good fit for:

- customer reply drafts
- offer explanations
- meeting note summaries
- staff checklist drafts
- content outlines
- vendor comparison tables

Watch for:

- confident language based on missing facts
- invented details
- tone that does not sound like you
- answers that need legal, tax, medical, HR, or compliance review

Document And Notes Tools

Category: document, notes, or knowledge base tool.

Examples with free access or free tiers: Google Docs, Word if you already have it, Apple Notes, Notion free.

Use for:

- prompt library
- FAQ bank
- staff checklists
- weekly recaps
- edited reply examples
- process docs

Good fit for:

- saving the prompts that work
- keeping edited versions of customer replies
- writing standard operating procedures
- storing approved language your team can reuse

Spreadsheet Tools

Category: spreadsheet tool.

Examples with free access or existing-device access: Google Sheets, Excel if you already have it, Numbers.

Use for:

- open lead tracking
- vendor comparison
- simple reporting
- follow-up dates
- content calendar
- decision tables

Good fit for:

- any task with status, owner, due date, source, next step, or priority
- simple owner dashboards
- follow-up lists
- vendor or tool comparisons

Form Tools

Category: form or survey tool.

Examples with free access or free tiers: Google Forms, Microsoft Forms if you already have Microsoft 365.

Use for:

- intake questions
- quote request details
- customer feedback
- event sign-ups
- internal requests

Good fit for:

- turning scattered emails or texts into a cleaner set of answers
- making sure the same information is collected every time
- giving AI cleaner material to summarize later

Email And Calendar Tools

Examples: Gmail, Outlook, Apple Mail, Google Calendar, Outlook Calendar.

Use for:

- inbox triage
- follow-up tracking
- appointment prep
- scheduling notes
- customer communication

Good fit for:

- finding the original customer context
- sending human-reviewed drafts
- creating reminders
- keeping next steps tied to dates

Design Tools With Free Tiers

Category: lightweight design, layout, or visual editing tool.

Examples with free access or free tiers: Canva Free, Adobe Express, Microsoft Designer, Google Slides, Google Drawings, Figma Free, Photopea.

Use for:

- simple social posts
- flyers
- event graphics
- basic handouts
- visual versions of approved copy
- simple slide-style explainers
- basic image edits

Choosing A Design Tool

Need	Tool category	Examples
Make a social post, flyer, one-page handout, or event graphic	Template-based design tool	Canva Free, Adobe Express
Create a quick image or simple visual concept from a prompt	AI-assisted design or image tool	Microsoft Designer, Adobe Express, Canva
Build a simple guide, checklist, or slide-style handout	Presentation or layout tool	Google Slides, PowerPoint if you already have it, Canva

Make a reusable layout or rough interface mockup	Collaborative design tool	Figma Free
Edit or clean up an image in the browser	Browser-based photo editor	Photopea, Adobe Express

Good fit for:

- turning an approved post into a graphic
- making a simple event flyer
- creating a handout from a checklist
- creating a simple before/after graphic
- turning a process into a visual one-pager
- making workshop slides or printable worksheets

Keep the writing review outside the design tool. Get the message right first, then format it.

Remember: check export options, watermark rules, template licensing, stock image licensing, and brand settings before using a design publicly.

Transcription Or Meeting Note Tools With Free Tiers

Category: transcription, dictation, captions, or meeting notes.

Examples vary by device, meeting platform, and account. You may already have transcription inside a phone, document app, meeting app, or recorder.

Use for:

- call notes
- job notes
- meeting summaries
- action items
- owner voice notes
- interview notes
- discovery call notes

Choosing A Transcription Tool

Need	Tool category	Examples
Quick voice note after a job, call, or idea	Built-in phone recorder with transcription	Apple Voice Memos on supported iPhones, Google Recorder on supported Pixel phones
Dictate directly into a document	Live dictation	Google Docs voice typing
Record and summarize online meetings	Meeting note tool with a free tier	Fathom, Fireflies, Otter
Follow along during a video call	Meeting captions	Zoom auto-generated captions
Transcribe a recording you already have	Document transcription	Microsoft Word Transcribe if you already have Microsoft 365

Good places to start:

Built-in phone tools

- Apple Voice Memos can transcribe recordings on supported iPhones.
- Google Recorder can transcribe recordings on supported Pixel phones.

These are good first steps for quick voice notes, job notes, owner recaps, or ideas you want to capture before they disappear.

Meeting tools with free tiers

- Fathom has an individual free plan that can record and transcribe meetings.
- Fireflies has a free plan with meeting transcription and a storage limit.
- Otter has a Basic free plan with monthly transcription limits.

These are better fits for Zoom, Google Meet, Teams, interviews, discovery calls, vendor calls, or recurring internal meetings.

Tools you may already have

- Google Docs voice typing can turn live dictation into text.
- Zoom offers auto-generated captions for meetings.
- Microsoft Word Transcribe can be useful if you already have Microsoft 365.

Use these when you do not need a full meeting-notes system and only need a rough transcript to clean up afterward.

Remember: check current free-tier limits before relying on any one tool. Also check consent rules, company policy, and privacy settings before recording people or uploading anything sensitive.

Automation Tools

Automation tools are not required for the DIY walkthroughs in this guide.

Once a manual workflow is clear, automation may help connect steps. For example, a lead form could add a row to a spreadsheet, create a reminder, or notify someone on the team.

Do the manual version first. It shows you what the process should be before you try to connect tools together.

Examples with free tiers: Zapier, Make, and built-in automations inside tools you already use.

Use carefully for:

- copying form submissions into a spreadsheet
- creating reminders
- sending internal notifications
- moving approved information from one tool to another

Do not automate customer promises, pricing, legal language, payment decisions, employee issues, or anything that should be reviewed by a person.

Tool Pairings By Pressure Point

Pressure point	Tool pairing
Lead Follow-Up	Free AI chat tool + inbox/contact form + document or spreadsheet
Repeated Customer Questions / FAQ Bank	Free AI chat tool + document or notes app
New Customer Onboarding	Free AI chat tool + document + email/calendar tools
Dormant Customer Re-Engagement	Free AI chat tool + customer list + email tool
Reviews, Testimonials, And Referrals	Free AI chat tool + document + email/text tool
Difficult Customer Messages	Free AI chat tool + cleaned-up situation summary + document
Upsell / Cross-Sell Opportunities	Free AI chat tool + service list + document
Offer Clarity / Service Explainers	Free AI chat tool + document + website/social notes
Marketing Consistency	Free AI chat tool + document + optional design tool with free tier
Newsletter / Email Updates	Free AI chat tool + email tool + document
Local Event Or Seasonal Promo Planning	Free AI chat tool + document + spreadsheet + optional design tool
Before/After Story Capture	Free AI chat tool + document + approved photos/details

Quote / Proposal Prep	Free AI chat tool + source notes + document
Messy Intake	Free AI chat tool + form/email notes + spreadsheet
Inbox Triage	Existing email + free AI chat tool + notes document
Scheduling / Appointment Prep	Existing calendar + email + free AI chat tool
Meeting / Call / Job Notes	Notes/transcript + free AI chat tool + document
Form Creation	Free AI chat tool + document/forms tool you already use
Document Cleanup	Free AI chat tool + existing document + notes app
Weekly Owner Recap / Basic Reporting	Spreadsheet or notes doc + free AI chat tool
Task Prioritization	Task list + free AI chat tool + notes app
Staff Checklists / Process Docs	Free AI chat tool + document or notes app
Handoff Clarity	Free AI chat tool + document + email/chat tool
New Employee Onboarding	Free AI chat tool + document + approved training notes
Hiring Post / Role Clarity	Free AI chat tool + role notes + document
Interview Questions	Free AI chat tool + role notes + document
Performance Feedback Drafting	Free AI chat tool + cleaned-up situation summary + document
Internal Announcements	Free AI chat tool + document + email/chat tool
Invoice / Payment Follow-Up	Free AI chat tool + invoice status summary + email tool
Price Increase Communication	Free AI chat tool + approved pricing details + email/document
Vendor Email Drafting	Free AI chat tool + vendor notes + email tool
Expense / Bookkeeping Prep Notes	Free AI chat tool + notes/spreadsheet + bookkeeping questions
Decision Support / Vendor Comparison	Free AI chat tool + spreadsheet or document