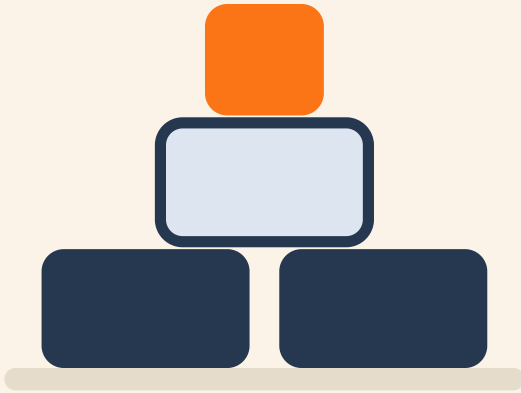




Nine building blocks for putting AI to work

Nine short cards. Each one adds one building block, starts from a real seat in your business, and ends with something you can try in five minutes.

- 1 **Ask it**
Chat
- 2 **Write the process once**
Saved instructions
- 3 **Give it the background**
Your knowledge
- 4 **Ask for the finished piece**
Finished results
- 5 **Connect it to your tools**
Connected apps
- 6 **Decide what it does alone**
Permissions
- 7 **Put it on a schedule**
Scheduled tasks
- 8 **Give it a seat**
AI employee and its charter
- 9 **Help it get better**
Improvement cycle

HOW TO USE THEM

- ✓ Go in order. Each card leans on the one before it.
- ✓ Try the five-minute win with your own work, not a made-up example.
- ✓ Check its work every time. You stay in charge.
- ✓ The ideas work in any AI assistant. The tool notes show where to find each one in ChatGPT, Claude and Gemini.
- ✓ Then try a process card: it puts several blocks to work for one seat, with its charter.



The building block: chat

WHEN TO REACH FOR IT

**Seat: Customer service**



Write the process once

The building block: saved instructions

Saved instructions it follows every time, so you stop retyping how you like things done.

WHEN TO REACH FOR IT

You have typed the same directions three times: the format, the tone, the steps and the things it must never do.

Stuck on: Expense notes arrive in a different shape every month, and you tidy them by hand.

Write the process:

When I paste expenses, return a table of date, vendor, amount and category from this list: [your categories]. Flag anything over \$500 or missing a receipt.

Save it, then paste this month's list.

HOW TO CHECK ITS WORK

- ✓ The table's total matches your own total.
- ✓ Spot-check five categories against the receipts.
- ✓ The flagged lines are the ones you would have flagged.

IN THE TOOLS YOU USE

ChatGPT Custom instructions, or a custom GPT for one job.

Claude A skill, or the instructions in a project.

Gemini A Gem.



Give it the background

The building block: your knowledge

A home for your files and facts, so every answer starts from your business instead of a guess.

WHEN TO REACH FOR IT

The answers sound generic because it does not know your prices, policies, products or past work.

Seat: Hiring and onboarding

Stuck on: Every new hire asks the same twenty questions in their first week.

Take out anything private first, then add your handbook, holiday calendar and benefits summary. Ask:

A new hire wants to request a day off. Answer in three steps, using only these files, and name the file you used.

HOW TO CHECK ITS WORK

- ✓ It names the file, and the file really says that.
- ✓ Ask something the files do not cover. It should say it does not know.
- ✓ Its answer matches what your office manager would say.

IN THE TOOLS YOU USE

ChatGPT A project with files added.

Claude A project with project knowledge added.

Gemini A Gem with files, or a notebook in NotebookLM.



Ask for the finished piece

The building block: finished results

A ready-to-use result, such as a document, checklist, table or simple page, that you can edit, download and share.

WHEN TO REACH FOR IT

You do not want advice about the thing. You want the thing itself, ready to use.

Stuck on: The new-customer setup checklist lives in one person's head.

Paste their rough notes. Ask:

Turn these into a one-page checklist for setting up a new customer, with a checkbox, an owner and a due day for each step. Make it printable.

HOW TO CHECK ITS WORK

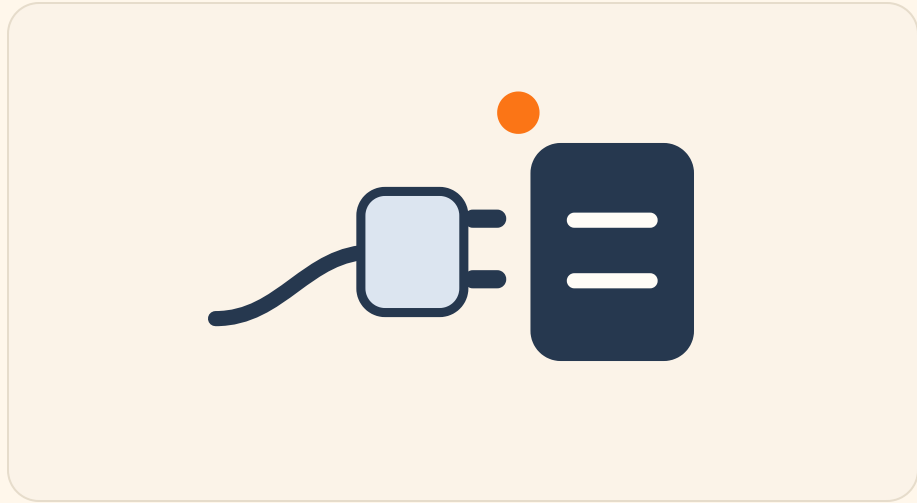
- ✓ Walk through it with the person who does the job today.
- ✓ Nothing is missing, and the steps are in the right order.
- ✓ Every step has an owner and a due day.

IN THE TOOLS YOU USE

ChatGPT Ask it to open a canvas.

Claude Ask for an artifact.

Gemini Ask it to open a canvas.



The building block: connected apps

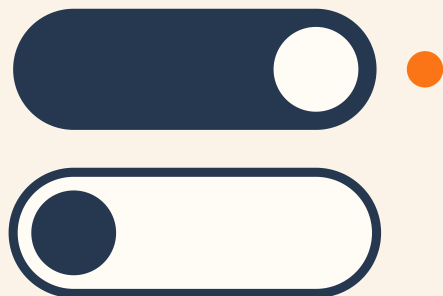
WHEN TO REACH FOR IT



Seat: Scheduling



The Easier Business



Decide what it does alone

The building block: permissions

Clear rules for what it may read, draft or do without asking you first, set in each tool's settings.

WHEN TO REACH FOR IT

Before you connect anything that can send, pay, delete or change a customer's record.

Stuck on: You want the help, but you worry it will email a customer something you never saw.

Open the settings for one connected app. Let it read freely, and make it ask before it sends or changes anything. Then ask for a reply draft and confirm it waits for your yes.

HOW TO CHECK ITS WORK

- ✓ Test it: ask it to send, and see that it asks you first.
- ✓ Check whether your plan uses your chats for training, and turn that off if you can.
- ✓ Know who else can see the chats on a shared account.

IN THE TOOLS YOU USE

ChatGPT Each app's permissions, and Data controls in Settings.

Claude Each connector's approval setting, and Privacy in Settings.

Gemini Connected app settings, and your Gemini activity setting.



Put it on a schedule

The building block: scheduled tasks

A task it runs on its own at a set time, leaving the result waiting for you.

WHEN TO REACH FOR IT

The job happens at the same time every week and starts by gathering the same information.

Stuck on: Quotes go out, and nobody follows up because Friday gets busy.

Set a weekly task for Friday at 9:

From my sent email, list quotes sent five or more days ago with no reply. Draft a short, friendly follow-up for each. Do not send.

HOW TO CHECK ITS WORK

- ✓ Read every draft for the first two weeks.
- ✓ Confirm it ran. An empty list should still say so.
- ✓ Keep “do not send” until it has earned your trust.

IN THE TOOLS YOU USE

ChatGPT Ask it to schedule a task; app access varies by plan.

Claude Scheduled tasks in Cowork, in the desktop app on paid plans.

Gemini Scheduled actions, on Google AI Pro or a Workspace business plan.



Give it a seat

The building block: ai employee and its charter

One job on your org chart, held by an AI employee, with a one-page charter: its name, its one job, who it answers to, what it may do and what it must never do.

WHEN TO REACH FOR IT

A job keeps coming back and uses several blocks together: the same process, the same files and the same apps.

Stuck on: The same questions about hours, prices and booking fill the shared inbox every day.

Start its charter. Name it like this: Seat, then

AI Employee

, then the name in parentheses, then the person it reports to — for example, “Front Desk AI Employee (Daisy), reports to Maria.” Then write its one job, its files, what it decides alone, what it asks first and three things it must never do.

HOW TO CHECK ITS WORK

- ✓ A named person reviews it on a set rhythm.
- ✓ One number shows it is helping, such as routine questions answered the same day.
- ✓ Anything about money or a complaint goes to a person.

IN THE TOOLS YOU USE

ChatGPT Name a project or custom GPT for the seat; paste the charter into its instructions.

Claude Name a project for the seat; paste the charter into its instructions.

Gemini Name a Gem for the seat; paste the charter into its instructions.



Help it get better

The building block: improvement cycle

A handful of test examples and a short monthly review, so each correction makes it better for good instead of being fixed again next week.

WHEN TO REACH FOR IT

It made the same mistake twice, or you are about to change its process, its files or its tools.

Stuck on: It keeps quoting last year's delivery fee, and someone fixes the draft by hand every time.

Fix it at the source: update the price file. Save five real questions with the right answers as its test. Run all five, then write one dated line in its change log: what changed and why.

HOW TO CHECK ITS WORK

- ✓ All five test examples still pass after every change.
- ✓ Each change has a dated line saying what changed and why.
- ✓ Once a month, spend 15 minutes on what to keep, fix and try.

IN THE TOOLS YOU USE

ChatGPT Edit the GPT or project instructions; Memory in Settings shows what it saved.

Claude Edit the project instructions or skill; check its memory in Settings.

Gemini Edit the Gem's instructions; check its personal context in Settings.