HOW TO USE



AI AGENTS

Smart Businesses Deploy AI Agents To Reclaim 20+ Hours Per Week By Automating Boring But Vital Business Tasks

[Includes 100+ Industry-Tested Ready To Deploy AI Prompts]

RAM VALIA

FOR LOCAL BUSINESS OWNERS

AI AGENT PLAYBOOK

A practical guide to automating business

tasks step by step.

Fifteen industry playbooks, six hands-on setup guides, twelve digital

specialists, 204 numbered prompts and six complete worked campaign packs.

Put AI agents to work on the phone you cannot answer and the hours you do not have.

Ram Valia

Disclaimer

Results vary. Every business in this book is different, and so are its results. Nothing here is a promise of revenue, leads, rankings, review counts or time saved. Where outcomes appear, they are framed as targets to measure against your own baseline **- because that is the only honest way to frame them.**

Case studies are reported, not guaranteed. The BRE Law figures in Part 4 are quoted exactly as published by the vendor (aibypulse.com), with their measurement windows, verified 29 October 2026. They show what one firm measured in its own **periods. They do not predict your results.**

Scenarios are illustrative. Timed day-in-the-life stories, named customer examples and weekly rhythms in this book are illustrations of how the workflows are intended **to run. They are not customer results or confirmed live runs.**

Product behaviour changes. Features, integrations and prompt behaviour described here reflect the Xpress AI co-worker platform as published at xpressaicoworker.com in October 2026. Where this book recommends a workflow, **check the current product documentation for what is supported today.**

Not professional advice. Nothing in this book is legal, financial, medical or compliance advice. Decisions about your business, your advertising spend and your customer communications remain yours - which is the entire point of the approval-**first approach this book teaches.**

Spending is yours. Any advertising budget, software subscription or tool mentioned here is a cost you choose, cap and control. This book will repeatedly tell **you to set the cap yourself. It means it every time.**

New: AI foundations and the industry map. Use editable headings; Word pagination differs from PDF.

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Entries and page numbers are live Word fields: entries jump to the matching section, and numbers show this Word edition's own pagination. Fields refresh when the document opens in Word (or press Ctrl+A then F9). The print PDF edition has its own fixed pagination.

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204 numbered prompts: 96 vendor-library entries plus 108 authored prompts. Worked packs and industry adaptations are additional teaching material, not counted as extra numbered prompts.

Source checks are dated 29 October 2026. Distributed author-edition notes aid identification; they are not removal-proof.

Author-edition note: Ram Valia, founder of Xpress AI and author of this book. Website: www.xpressaicoworker.com. Check completion.

Part 4 covers fifteen industries: trades & home services, education & tutoring, migration & professional services, law firms, medical & allied health, trucking & transport, warehousing & logistics, physical retail & motor dealers, restaurants & food, event venues, real estate, accounting & bookkeeping, fitness & gyms, beauty & salons, and automotive repair. Jump straight to yours - then read Part 1, because **the audit is what tells you where your money is actually going.**

The engine, the desk and the work

Training is learning; inference is using

Training adjusts a model's learned numerical values using examples and an optimisation process. Inference uses a trained model on new input: classifying an invoice, recognising speech or generating a reply. It is not the same as searching a database, although a product can combine inference with search. A long-running agent may make many inference requests and tool calls for one business job. [S1,S2]

Parameters are not your prompt settings

Model parameters are learned values, such as weights, that shape how inputs map to outputs. Parameter count alone does not establish quality, speed or fitness for a task. Architecture, training data, training method, inference configuration and the task also matter. You usually do not edit a hosted model's weights in a chat. Temperature, output limits and reasoning effort are operating settings, not a way to set the model's parameter count. Some development routes support fine-tuning, but that is a separate training process. [S2,S3]

Context is the material on the desk

Context is the input available for the current request: instructions, selected conversation history, documents, retrieved passages and tool results. A context window is the maximum token budget for a request, subject to that model's accounting rules. It is not a guarantee of permanent memory or perfect recall. Output, and sometimes internal reasoning, consumes budget too. A saved customer record in an application is a different thing from what the model actually receives this time. [S3,S4]

A business example

You ask for an overdue-invoice draft. Training produced the underlying model. The verified invoice, payment state and approved reminder policy are context. Inference produces the draft. A connected accounting tool can supply current records; a separate authorised action would send the message. More parameters or a larger context window does not prove the invoice is unpaid or give permission to send. This example is fictional, not an executed workflow.

Limits: six different ceilings

Do not ask only: how big is the model?

1. Context window: how much the model can consider per request. 2. Output ceiling: how much it may generate in one response. A million-token input window does not mean a million-token answer. 3. Rate limits: requests or tokens per minute/day, often tied to account tier. 4. Product limits: uploads, messages, file size, tools, regions and subscription access. 5. Knowledge cutoff: a training-data boundary, not a live news feed. 6. Operating limits: latency, cost, privacy, service availability and your own approval rules. [S3-S7]

A bigger desk does not make every answer better

Long context helps when the task needs a large evidence set, but relevant evidence can still be missed. Retrieve the right passages, keep source IDs, split large work into checked stages and test the final result. Do not stuff every company document into every request. Token counts vary by model and language; image, audio, file and request-format accounting can differ from simple text estimates. Use the provider's actual counter where available. [S3,S4]

Compare the route, not only the logo

An API model specification is not a ChatGPT, Claude, Gemini or Grok subscription promise. A model reached directly, through a cloud marketplace or through another application may have different IDs, features, pricing, regional access and service terms. Record provider, exact model/version, route, date, input/output budget, rate tier, data policy and required tools. Recheck before deployment. The provider-limits pages later in this section give dated examples, not permanent rankings. [S4-S7]

A practical selection test

Use the same small, permitted test set for each candidate. Include a normal case, missing fact, misleading source, long document, duplicate record and request outside permission. Score factual accuracy, source support, exception handling, total latency, token/tool costs and human review time. Choose the least complex setup that passes your task threshold. This is a proposed evaluation method, not a claim that a model has passed it.

Two chains meet inside an AI service

Physical supply chain

Materials and energy -> equipment and chip design -> wafer fabrication -> packaging and memory -> servers and networks -> powered, cooled data centres. These steps produce and operate computing capacity. They are not stages through which a customer's raw document physically travels. [S8-S13]

Information and service chain

Permitted training data -> preparation and evaluation -> training/post-training -> model weights -> inference service -> application and approved tools -> reviewed business outcome. At runtime, the application may retrieve current business records without retraining the model. The data used to train a foundation model is not automatically the same as your customer database. [S1-S4,S14,S15]

The two chains intersect

Training and inference consume compute, memory bandwidth, storage, networks and electricity. A model developer may buy cloud capacity rather than own factories. A cloud provider may use NVIDIA or AMD GPUs, its own accelerators, or a mixture. An application may use several model providers and add workflow logic, permissions, search, records and support. A business usually buys this managed service, not a rack of accelerators. [S8,S12-S16]

Not a single domino line

NVIDIA is important, but no NVIDIA does not mean no AI. Google documents its own TPUs, AWS and Anthropic describe Trainium use, AMD supplies AI accelerators, and smaller workloads can run on CPUs or local devices. These are alternatives at particular layers, not instant interchangeable replacements. Software, capacity, performance, geography and switching costs constrain what can actually move. [S1,S12,S16,S17]

The industry map: physical foundations

ROLE	REPRESENTATIVE COMPANIES / EXPLANATION
Read this chart	Roles are on the left; representative company names are on the right. It is a selective map, not every supplier, an endorsement or a ranking. A company can occupy several roles. The next chart continues upward into software and business delivery.
Materials / substrates	Shin-Etsu Chemical: semiconductor-grade silicon wafers. These are prepared substrates, not finished AI processors. Electricity, water, chemicals and specialist components are cross-cutting inputs. [S9]
Design / engineering tools	NVIDIA and AMD design accelerators; Google designs TPUs; AWS develops Trainium. Cadence supplies electronic-design and verification tools. A chip designer is not necessarily the company operating the wafer factory. [S8,S12,S16-S18]
Manufacturing equipment	ASML: lithography systems that print patterns. Applied Materials: deposition, material removal/shaping and analysis equipment. No one machine supplies an entire factory process. ASML itself relies on an ecosystem of partners and suppliers. [S10,S11,S19]
Foundries / wafer fabrication	TSMC and Samsung Foundry manufacture semiconductor wafers using customers' designs and qualified processes. Intel also has manufacturing and foundry capabilities. These are different commercial and technical models, not equivalent capacity for every chip. [S8,S13,S20,S21]
Memory / packaging / assembly	SK hynix, Micron and Samsung supply memory. High-bandwidth memory sits close to accelerators and feeds data quickly; it is not a model's learned knowledge or a chat's memory. TSMC provides advanced packaging; NVIDIA's filing also names assembly/testing partners such as Hon Hai and Wistron. [S8,S13,S22]
Infrastructure / operation	NVIDIA, AMD and their system partners supply compute platforms; cloud operators such as AWS, Microsoft Azure and Google Cloud assemble and operate services around compute, networking, storage, cooling and power. Availability of chips alone does not establish a working, authorised AI service. [S8,S12,S14,S16,S17]

The industry map: data to daily work

ROLE	REPRESENTATIVE COMPANIES / EXPLANATION
Data owners / preparation	Businesses, creators and licensed data suppliers provide permitted material. Scale AI describes data solutions and evaluation work; a customer still has to establish rights, privacy, scope and appropriate handling. More data is not automatically better data. [S15,S23]
Foundation-model developers	OpenAI, Anthropic, Google DeepMind, Meta and xAI are examples. They develop models; their consumer apps, APIs and licensing routes are distinct products. OpenAI is the company behind ChatGPT; ChatGPT is not the name of its CEO. [S5-S7,S23,S24]
Cloud / model distribution	Microsoft Azure, AWS and Google Cloud provide infrastructure and routes to models. Anthropic's documentation lists distinct IDs across its own API and several cloud platforms. A distributor may not own the underlying model. Check the actual route and its contract. [S4,S14,S16,S34]
Inference infrastructure	Baseten supplies infrastructure and engineering for serving models, optimisation and production operation. This is a different role from creating every underlying foundation model or building the chips. Its claims about performance and uptime are vendor claims, not independently tested results in this book. [S25]
Applications / workflow products	ChatGPT, Claude, Gemini and Grok are familiar interfaces. Business applications may add retrieval, documents, records, tools, approvals and audit trails around a model. A so-called wrapper can be useful when these layers work well; the label alone tells you little about reliability, data handling or value. [S4-S7]
Integrators / agencies / internal teams	They translate a business process into a configured system: clean data, map fields, connect authorised tools, draft assets, test exceptions, train staff and maintain the workflow. This is a service role, not evidence of owning the model. For Xpress AI or any other platform, verify the actual plan, supported connections and action limits before promising a feature.
Business owner / end user	Sets the goal, budget, recipients, approval boundaries and success measures. The final output must be checked in the destination system. A generated draft is not a sent email, a proposed booking is not a confirmed reservation, and a successful API response is not proof of a useful business outcome.

Why the bottlenecks matter

ASML is the name, not ADML

ASML is based in the Netherlands. Its EUV systems use 13.5-nanometre light for very small patterns; its page explains that EUV and DUV tools work together on different chip layers. ASML is a rare, highly concentrated capability in advanced fabrication, but saying all chips cannot exist without EUV is wrong. The dependency depends on process and product. [S10,S19]

TSMC manufactures; NVIDIA designs

NVIDIA's fiscal 2026 filing says it uses a fabless, contracted manufacturing strategy. It names TSMC and Samsung as foundries, and SK hynix, Micron and Samsung as memory suppliers. A modern accelerator depends on design, fabrication, memory, packaging, testing and software. TSMC is not merely reproducing a finished NVIDIA chip; fabrication turns a qualified design into working silicon through complex manufacturing steps. [S8]

A real scale statistic

TSMC's 2025 annual report says it manufactured 12,682 products using 305 technologies for 534 customers. Those are company-reported 2025 figures, not an AI-only count, current market share or a claim that every customer uses the same advanced process. The report shows why one factory business can sit beneath many brands. [S13]

Capacity is more than processor count

A system can be limited by memory bandwidth, advanced packaging, network links, power availability, cooling or software. Micron describes HBM as stacked DRAM for high data throughput; Google's Ironwood announcement discusses memory, networking and liquid cooling together. Buying more processors does not remove a slow database or an unreliable business process. [S16,S22]

Diversification takes engineering

Google TPUs, AWS Trainium and AMD accelerators demonstrate alternatives to NVIDIA GPUs. But moving a workload can require new kernels, libraries, testing, contracts and capacity planning. Do not sell multi-provider support as tested failover until the actual workflow has passed controlled tests on each route. [S12,S16,S17]

Follow one customer enquiry

A fictional service-business example

An adult customer asks whether a company can attend a repair job. The website form collects only necessary details and the allowed contact choice. The application validates fields, records a request ID and checks whether the enquiry is a duplicate. This scenario teaches architecture; it is not a claim that a named platform supports or has executed every step.

1. Retrieve evidence

An authorised connection reads service coverage, opening hours, approved prices and actual booking availability. Those facts come from current systems, not the model's training memory. The application retrieves only material relevant to this enquiry and records source timestamps.

2. Run inference

A trained model receives instructions plus the selected facts. The inference service runs on processors with memory and supporting infrastructure. It returns a proposed classification and reply. The application checks the output format and flags any unsupported price, time or policy statement. [S1-S4]

3. Apply business controls

A rule determines whether the draft requires staff review. The owner's defined authority, correct recipient, actual channel permission and any spending or booking conditions govern the action. The model does not obtain new authority by sounding confident. A request outside coverage is routed to a person, not invented into availability.

4. Verify the result

After an authorised send or booking, read the destination record and receipt. A timeout creates an unknown state until checked; retrying blindly can send twice. Reconcile the request ID across form, CRM, message and calendar. Record exceptions, opt-outs and the next owner.

Who earns their fee?

The cloud/inference provider supplies compute and service operation; the model developer supplies model capability; the application supplies the workflow; the agency or internal team configures, tests and maintains it. The business pays for a reliable outcome, not merely a clever sentence. Ask each supplier what it owns, what it resells and what happens when a dependency fails.

People behind the names

Jensen Huang / NVIDIA

NVIDIA identifies Huang as its founder and CEO. His 2026 five-layer account links energy, chips, infrastructure, models and applications. It is a useful industrial framing from a company that sells into the stack, not a neutral proof of every demand forecast. [S26]

Sam Altman / OpenAI

OpenAI's own 2026 event identifies Altman as co-founder and CEO. ChatGPT is a product, not a person or a separate model company. Altman's public essays argue that more capable and cheaper AI could support virtual co-workers; these are expectations, not guaranteed business savings. [S24,S27]

Dario Amodei / Anthropic

Anthropic identifies Amodei as co-founder and CEO. His 2024 essay explores potential benefits and risks of powerful AI while explicitly warning that no one can know the future precisely. Do not turn his conditional scenarios into a delivery schedule. [S14,S28]

Andrej Karpathy / researcher and educator

Karpathy's own biography describes him as an AI researcher and educator, an OpenAI founding member and former Director of AI at Tesla. He is not the CEO of OpenAI or Anthropic. His educational work is useful for understanding training and deployment, not for establishing the current pricing of a provider. [S29]

Alexandr Wang / Meta and Scale AI

The spelling in Meta's leadership page is Alexandr Wang. Meta says he joined in June 2025 as its first Chief AI Officer and leads Meta Superintelligence Labs. He founded Scale AI; Scale's June 2025 announcement links Meta's investment to expanded data collaboration and Wang's move. [S23,S30]

Baseten is a separate company

Baseten's company page lists Tuhin Srivastava, Amir Haghighat, Phil Howes and Pankaj Gupta as its founding team. It describes an inference-infrastructure business. ItsJanuary 2026 funding announcement includes NVIDIA as an investor. That does not make it Wang's company, Meta's model lab or an NVIDIA-owned subsidiary. [S25,S31]

Three voices, not three guarantees

Jensen Huang: infrastructure first

"AI runs on real hardware, real energy and real economics." - Jensen Huang, NVIDIA blog,10 March 2026. The practical lesson is to ask about capacity, running cost and reliability beneath the app. This is his framing, not proof that a particular capital project will pay off. [S26]

Sam Altman: virtual co-workers

"We are now starting to roll out AI agents, which will eventually feel like virtual co-workers." - Sam Altman, Three Observations,2025. The word eventually matters: a forecast about an industry does not establish that today's product can perform your exact workflow safely. [S27]

Dario Amodei: uncertainty belongs in the picture

"Of course no one can know the future with any certainty or precision" - Dario Amodei, Machines of Loving Grace,October 2024. His essay presents a possible upside if important problems are solved, not measured outcomes or a service commitment. [S28]

How to read CEO stories

Separate a direct quote from a paraphrase, a prediction from a result, a company announcement from independent testing, and market growth from your own return on investment. A CEO may have useful technical knowledge and a financial interest in adoption at the same time. Date every quote and preserve its qualification.

A better business question

Instead of asking whether a famous executive says AI will change everything, ask which task can be tested this month with controlled access, real baseline data, a fallback and a person accountable for the outcome. Use the technology story to understand the market, then use evidence to decide your own investment.

When suppliers also become investors

Three arrows that must not be confused

Equity investment: money buys an ownership interest. Compute purchase: a customer commits to buying services. Product distribution: one company makes another company's model available. The same parties can have all three relationships. Announced commitments, completed cash transfers and recognised revenue are different states. [S14,S17,S30,S31]

A dated, concrete example

On 18 November 2025, Anthropic, Microsoft and NVIDIA announced a partnership: NVIDIA committed to invest up to US$10 billion and Microsoft up to US$5 billion in Anthropic; Anthropic committed to purchase US$30 billion of Azure compute and contract additional capacity up to one gigawatt. These are the stated announcement terms, not a claim that every dollar had been paid by that date or that the investment and purchase totals should be netted. [S14]

Another route, not exclusive dependence

Anthropic's 22 November 2024 AWS announcement described a new US$4 billion Amazon investment, bringing the announced total to US$8 billion while Amazon remained a minority investor. It also named AWS its primary cloud/training partner and described Trainium collaboration. This is a historical deal example, not a statement of the latest cumulative investment or an exclusive right to every Anthropic workload. [S17]

Talent, data and inference examples

Scale's 12 June 2025 announcement said Meta's investment valued Scale above US$29 billion and expanded their commercial relationship. That valuation is not the cash amount invested. Baseten's 23 January 2026 announcement described a US$300 million round at a US$5 billion valuation and included NVIDIA among investors. A round total is not NVIDIA's individual contribution. [S30,S31]

Why the loop deserves scrutiny

An investor that sells chips or cloud services may benefit when an investee buys compute. This can support capacity and innovation, but also creates concentration, financing and demand-quality questions. These examples do not by themselves prove sham revenue, fraud or that identical dollars literally circulate. To assess that, inspect contracts, cash-flow statements, related-party disclosures and fulfilled orders rather than drawing conclusions from arrows alone.

Terafab: ambition versus operating capacity

What the name refers to

Terafab is the name used in 2026 reporting for the proposed Tesla/SpaceX chip-manufacturing project in Texas. It is not evidence that Musk already operates a mature, fully independent alternative to TSMC. Intel's first-quarter 2026 results say it joined as a strategic partner alongside SpaceX, xAI and Tesla. [S20,S32]

What was proposed

Reuters reported on 6 May 2026 that a filing described an initial US$55 billion SpaceX semiconductor-facility investment, potentially rising to US$119 billion with additional phases. It also reported Tesla's plan to use Intel's 14A process and a smaller research fab. These are proposed amounts and plans, not verified spending, yields, output or a guaranteed cost to completion. [S32]

The latest timeline checked for this edition

A 20 October 2026 Reuters report described a target for volume production in the third quarter of 2028, while quoting Musk's warning: "I put big error bars on this because we don't know if we will actually achieve this or not." The same report refers to Q3/Q4 as possible outcomes. Treat 2028 as an aspirational target, not an operating fact. [S33]

Would it reduce dependence?

If it achieves qualified production at competitive yield, cost and scale, it could add manufacturing capacity and reduce reliance on particular external suppliers for some workloads. That is conditional analysis, not a measured result. A new fab still needs equipment, materials, process expertise, memory/packaging, electricity, water, skilled people and customers. Vertical integration changes dependencies; it does not erase them. [S10,S11,S19,S20,S32]

The milestones that would change the assessment

Watch for installed and qualified tools; working test silicon; the chosen production process; production yields; packaged and validated chips; sustained volume; external customer qualification; disclosed cost and delivery. A factory announcement, an equipment order, first test chip and high-volume commercial output are not interchangeable milestones.

What grows next, and what still needs people

A practical direction, not a dated prophecy

The sources point toward more inference, specialist accelerators, tighter memory/network integration and applications that combine models with tools. They do not prove when every occupation will be automated. Some tasks become cheaper; others expose bottlenecks in data, permissions, integration, trust and physical delivery. [S1,S12,S16,S26-S28]

Software and physical work move at different speeds

A model can draft a procedure quickly, but changing a regulated process, building a factory or installing equipment requires validation, people, materials and approvals. Robotics adds sensing, control, hardware reliability and safety constraints. Do not translate a text-model demo into a promise of unattended physical work.

The human work changes

People still define the goal, resolve conflicting facts, approve commitments, manage exceptions, care for relationships and accept accountability. Agencies and internal teams can add value by making these responsibilities explicit rather than hiding them behind a chatbot. Budget for review, support, security, training and maintenance, not only token charges.

An adoption ladder

First: read-only analysis with permitted data. Next: reviewed drafts and a small test set. Then: a narrow, authorised action with verified destination state and rollback where supported. Only expand after measured accuracy, cost, exception handling and review effort meet the owner's threshold. This is a proposed operating approach, not a universal product capability.

What to measure

Track useful completed outcomes, not merely model calls. Record success and failure counts, unresolved cases, time including review, total cost, customer complaints, opt-outs and mistakes needing repair. Compare with a real baseline and retain the definitions. No percentage saving is promised by this chapter.

Maintain the whole system, not just the prompt

Owner and version register

Record the business owner, technical operator, model/version/route, source systems, tools, data handling rules, recipients, spending limits and expiry/review date. Keep approved prompt and workflow versions with test evidence. A model alias can change what runs without changing the name in your interface. [S4-S7]

A change needs a test

Recheck when a model, price, endpoint, integration, policy or business rule changes. Run the same permitted regression cases, compare the outputs and inspect the actual records. Stage changes before production; preserve a working fallback. Do not silently substitute a different model for a high-stakes workflow.

Availability and unknown states

Define what happens on rate limits, unavailable tools, expired access, timeouts, partial writes and delayed messages. Stop when identity, permission or destination state is uncertain. Use stable request IDs and deliberate retry rules to reduce duplicate actions. Do not promise an automatic rollback where the external service does not support one.

Security and data boundaries

Use approved connections and the minimum data needed. Keep credentials out of prompts. Review retention, processing region, subprocessors, customer-data terms, access and incident contacts. A public model benchmark does not certify your privacy or compliance position. Qualified people should review regulated use.

Questions for a supplier or agency

Which parts do you own and which are resold? What exact model/API route runs this job? What changes by subscription or region? Where does data go? Which actions need approval? How do you verify completion? Who sees exceptions? What costs extra? Can we export our records and approved content? What happens if the model or cloud provider changes? Ask for evidence from your actual proposed setup, not a generic demo.

Source notes

S1 | IBM, What is AI inference?

https://www.ibm.com/think/topics/ai-inference

S2 | IBM, Model parameters

https://www.ibm.com/think/topics/model-parameters

S3 | OpenAI, Key concepts

https://developers.openai.com/api/docs/concepts

S4 | Anthropic, Context windows and model overview

https://platform.claude.com/docs/en/build-with-claude/context-windows

S5 | OpenAI, Models

https://developers.openai.com/api/docs/models

S6 | Google, Gemini API models

https://ai.google.dev/gemini-api/docs/models

S7 | xAI, Models

https://docs.x.ai/developers/models

Source notes (continued)

S8 | NVIDIA, FY 2026 Form 10-K, Manufacturing

https://www.sec.gov/Archives/edgar/data/1045810/000104581026000021/nvda-20260125.htm

S9 | Shin-Etsu, Semiconductor silicon business

https://www.shinetsu.co.jp/en/products/semiconductor-silicon-business/

S10 | ASML, EUV lithography systems

https://www.asml.com/en/products/euv-lithography-systems

S11 | Applied Materials, Semiconductor products

https://www.appliedmaterials.com/us/en/semiconductor/products.html

S12 | AMD, Instinct accelerators

https://www.amd.com/en/products/accelerators/instinct.html

S13 | TSMC,2025 annual report

https://investor.tsmc.com/static/annualReports/2025/english/index.html

S14 | Anthropic, Microsoft/NVIDIA partnership,18 Nov 2025

https://www.anthropic.com/news/microsoft-nvidia-anthropic-announce-strategic-partnerships

Source notes (continued)

S15 | Scale AI, Meta investment,12 Jun 2025

https://scale.com/blog/scale-ai-announces-next-phase-of-company-evolution

S16 | Google, Ironwood TPU,9 Apr 2025

https://blog.google/innovation-and-ai/infrastructure-and-cloud/google-cloud/ironwood-tpu-age-of-inference/

S17 | Anthropic, AWS expansion,22 Nov 2024

https://www.anthropic.com/news/anthropic-amazon-trainium

S18 | Cadence, ChipStack AI design/verification

https://www.cadence.com/en_US/home/tools/system-design-and-verification/chipstack-ai-superagent.html

S19 | ASML, Innovation ecosystem

https://www.asml.com/en/technology/how-we-innovate

S20 | Intel, Q 12026 results and Terafab partnership

https://www.intc.com/news-events/press-releases/detail/1767/intel-reports-first-quarter-2026-financial-results

S21 | Samsung, Foundry overview

https://semiconductor.samsung.com/foundry/

Source notes (continued)

S22 | Micron, High-bandwidth memory

https://www.micron.com/products/memory/hbm

S23 | Meta, Alexandr Wang leadership profile

https://www.meta.com/about/leadership/alexandr-wang/

S24 | OpenAI Forum, Sam Altman,6 Apr 2026

https://forum.openai.com/en/public/videos/event-replay-sam-altman-on-building-the-future-of-ai-2026-04-06

S25 | Baseten, Company and founders

https://www.baseten.co/about-us/

S26 | Jensen Huang, AI Is a 5-Layer Cake,10 Mar 2026

https://blogs.nvidia.com/blog/ai-5-layer-cake/

S27 | Sam Altman, Three Observations,2025

https://blog.samaltman.com/three-observations

S28 | Dario Amodei, Machines of Loving Grace,Oct 2024

https://darioamodei.com/essay/machines-of-loving-grace

Source notes (continued)

S29 | Andrej Karpathy, Biography

https://karpathy.ai/

S30 | Scale AI, Next phase,12 Jun 2025

https://scale.com/blog/scale-ai-announces-next-phase-of-company-evolution

S31 | Baseten, Series E,23 Jan 2026

https://www.baseten.co/blog/announcing-baseten-s-300m-series-e/

S32 | Reuters, Terafab plans,6 May 2026

https://www.reuters.com/business/autos-transportation/elon-musk-lays-out-terafab-ai-chip-project-plan-2026-05-06/

S33 | Reuters via Investing.com, Terafab target,20 Oct 2026

https://www.investing.com/news/stock-market-news/spacex-and-teslas-terafab-targets-2028-for-volume-chip-production-musk-says-4961351

S34 | Anthropic, Model overview

https://platform.claude.com/docs/en/about-claude/models/overview

S35 | Anthropic, Rate limits

https://platform.claude.com/docs/en/api/rate-limits

Provider limits: compare the actual route

Read the specification, not the brand name

Checked 29 October 2026. These are published API examples, not app subscription guarantees, a ranking or a promise of access. Providers can revise names, prices, limits and availability. Record the exact model and route in a procurement sheet.

Anthropic / Claude

The direct model-overview page lists Claude Fable 5.1, Opus 5 and Sonnet 5 with 1M-token context and 128K maximum output; Haiku 4.5 is listed with 200K context and 64K output. These are its synchronous API figures. Batch routes and specific headers can differ. Use the current model page and your account, not this printed table, for a deployment decision. [S34]

xAI / Grok

The models page lists grok-4.7 with 500K-token context, US$2 per million input tokens and US$6 per million output tokens. It describes configurable reasoning and separate voice pricing. Context is not the same as maximum output; inspect the endpoint contract before requesting a long response. [S7]

Google / Gemini

The Gemini API page describes Gemini 4 Argon (gemini-4-argon) with unified 1M context and long decodes up to 1M tokens. That is a statement about this model/API route, not every Gemini app, audio endpoint or image model. The page groups different models by task and marks preview/experimental or retired routes separately. [S6]

OpenAI / models and ChatGPT

The current models page lists GPT-6 Astra, GPT-6.1 Sol and GPT-6 Luna. The Astra and Sol cards each show 1.05M context and 128K maximum output. The API model list and pricing are distinct from ChatGPT subscription allowances. Check the exact model card before choosing. [S5]

Cost is a workflow calculation

Use the actual token counter

A rough English words-to-tokens shortcut is only an estimate. Tokenisers, language, images, files and request formatting change the count. Ask the actual provider counter where possible, and preserve the model/version with the estimate. [S3]

Separate the bill components

Model input and output charges can differ. Cached input, batch work, reasoning, tools, search, storage, audio and third-party services may have separate accounting. Your subscription, cloud contract or reseller may charge differently from a public base API price. Do not advertise a universal cost per customer task. [S3,S7,S34]

Fictional arithmetic, not a rate quote

Suppose a hypothetical model charges US$2 per million input tokens and US$10 per million output tokens. A request with 2,000 counted input tokens and 500 counted output tokens costs US$0.004 + US$0.005 = US$0.009 in those two components. This is invented pricing for arithmetic, not a current provider offer or measured workflow. Add tool fees, retries, storage, tax and human review as applicable.

What the owner should compare

Measure cost per useful, verified completed task. A cheap model requiring several corrections can cost more than a stronger one; a large model can be unnecessary for deterministic routing. Include latency, failure recovery, review time and vendor support. Keep a maximum spend and a stop condition for loops.

Rate limits are a separate bottleneck

A request can fit the context window and still hit requests-per-minute or tokens-per-minute limits. Tiers, cached-token treatment and endpoint rules vary. Plan queues and retries within current limits; never use account cycling or limit bypass as a reliability strategy. [S35]

Source and version discipline

A dated reference, not a permanent specification

This comparison records official documentation checked on 29 October 2026. Names, limits and prices can change. A printed table is a starting point for verification, not a substitute for a current model card or your actual account terms.

Do not make a moving specification evergreen

An online page can change after publication; a large context limit does not promise accurate retrieval, broad tool access or an unlimited subscription. Preserve your source check, then verify current official documentation and actual account state before buying, connecting or deploying.

Official model sources

OpenAI: https://developers.openai.com/api/docs/models
Anthropic: https://platform.claude.com/docs/en/about-claude/models/overview
Google: https://ai.google.dev/gemini-api/docs/models
xAI: https://docs.x.ai/developers/models

Official accounting and throughput sources

OpenAI concepts: https://developers.openai.com/api/docs/concepts
Claude context: https://platform.claude.com/docs/en/build-with-claude/context-windows
Claude rate limits: https://platform.claude.com/docs/en/api/rate-limits

Your comparison record

Provider and route | exact model/version | checked date | context and output ceilings | rate tier | region | data terms | tools | price components | test results | fallback owner. Unknown values stay unknown until verified.

The phone that rings out.

Every business says it answers every enquiry. Almost none do - after hours, mid-job, or on the busy days. This pillar counts what missed and **slow responses actually cost you.**

What it looks like

Calls that hit voicemail

People ring when the problem is urgent - a burst pipe, a court date, a truck off the road. Voicemail means they ring the next name on the list.

Messages that wait days

Web forms, WhatsApp, Facebook messages. Each channel is a separate inbox, and the quiet ones rot.

No log, no memory

Ask what came in last week and who got back to whom. If the answer is a shrug, enquiries are leaking.

The story we tell ourselves. 'I always ring back.' Sometimes true. The **missed-call log tells the real story.**

What it costs: Missed enquiries x conversion rate x average job value. Forty missed, one-in-four conversion, $3,000 average job - that's the size of the hole, not next month's cash.

Count it this week - Enquiries & response

1

Pull last month's calls

From your phone or carrier app: total calls, missed calls, after-hours calls.

2

Check every inbox

Email, web form, Facebook, Instagram, WhatsApp, SMS. Count anything unanswered over 24 hours.

3

Write the three numbers down

Missed calls, slow messages, total. No judging - just the counts.

4

Ring five missed numbers back

How many had already bought elsewhere? That ratio is the leak.

Who closes this leak

1

Answer and log every enquiry Vera

2

Sort the inboxes overnight Emily

SEND THIS TO START

“Summarise every call and enquiry we handled this week: who got in touch, what they needed, how fast we answered, and what is still waiting on me.”

One message shows what your response coverage actually looks like - the starting measurement.

Not found, not named.

Customers search, scroll maps, and increasingly ask AI assistants who to call. If you are invisible in those three places, the best service in town **loses to the most visible one.**

What it looks like

Page two of the map

Search your main service plus your suburb. If you are not in the map pack, most searchers never see you exist.

Assistants don't know you

Ask an AI assistant for the best business like yours nearby. Note whether you are named - and what is said about you.

A stale profile

Old hours, no photos, unanswered reviews, last post from last year. A neglected profile reads as a neglected business.

The story we tell ourselves. 'My work speaks for itself.' To people who already know you, sure. Everyone else meets your Google profile first - and **it hasn't been touched in a year.**

What it costs: Never shows as a loss - shows as jobs you never knew existed. Count how many of last month's new customers found you online versus referral only.

Count it this week - Visibility

1

Run the three searches

Service + suburb in Google, in Maps, and in one AI assistant. Screenshot **each result.**

2

Open your Google Business Profile

Hours, services, photos, posts, Q&A. Count what is missing or stale.

3

Compare with the top three

What do the three visible competitors have that you don't - photos, review

counts, posts, service pages?

4

Write the gap list

Five concrete gaps. Not 'be better at marketing' - five things you can

actually fix.

Who closes this leak

1

Be found on Maps and in AI answers Marco

2

Keep the content fresh Wes

SEND THIS TO START

“Ask ChatGPT, Gemini and Perplexity: who are well-reviewed [your service] businesses in [your suburb]? Report whether I'm named, what they say about me,

and what they say about my top three competitors.”

A snapshot of whether assistants name you - a reading to re-check monthly, not a ranking promise.

Quotes that go quiet.

You did the hardest part - someone asked for a price. Then the quote went out, nobody chased it, and your silence read as disinterest. Follow-up is the cheapest leak to fix and the most common one.

What it looks like

Send and pray

The quote leaves, and nothing is scheduled to happen next. Whether you hear back is left to luck.

The awkward second touch

Nobody wants to feel pushy, so nobody follows up. The customer who was 'just comparing' never hears from you again.

Cold enquiries, forgotten

Last season's almost-customers sit in a spreadsheet. They already know you - warming them up is cheaper than finding strangers.

The story we tell ourselves. 'If they wanted it, they'd call back.' They had three quotes. The business that checked in felt like the one that cared.

What it costs: Quotes x your follow-up lift. One extra quote in ten converting because someone asked twice - price that against your average job.

Count it this week - Follow-up

1

Count last quarter's quotes

How many went out? Include the verbal quotes and the driveway prices.

2

Count the second touches

How many of those quotes got any follow-up at all - a call, a text, anything?

3

Count the wins

How many jobs came back after a follow-up, versus before one?

4

List the cold file

Enquiries from 3-12 months ago that never bought. That list is an asset you **already own.**

Who closes this leak

1

Second and third touches, in your words Piper

2

Revive the cold file Piper

SEND THIS TO START

“Draft a follow-up for [name], who enquired about [job] on [date] and hasn't booked. Warm, short, no pressure - one question that makes it easy to reply.”

Second touches in your words, prepared for your tap. Nothing sends without you.

Happy customers, silent online.

Your happiest customers almost never review you unasked. Your unhappiest ones need no invitation. Left alone, your online reputation can reflect a small, unrepresentative slice of customers.

What it looks like

A review count from another era

Twelve reviews, newest one eight months old. Competitors pass a hundred with fresh ones every week.

Nobody asks

The job ends, the customer is thrilled, and no one ever asks them to say so where it counts.

Bad reviews hang unanswered

A reply won't change the reviewer - but every future customer reads your silence as agreement.

The story we tell ourselves. 'People will review if they're happy.' They won't.

Happiness is silent - make speaking up easy at the right moment.

What it costs: Reviews compound. Track your count month over month - that number, and what it does to your enquiry flow, is the cost or the win.

Count it this week - Reviews & reputation

1

Count your reviews

Google, Facebook, anywhere else customers look. Note the count and the **newest date.**

2

Count last month's completed jobs

Divide one by the other. That is your ask rate - and it is probably near zero.

3

Read your last ten reviews

Answered or not? What do the themes tell you about the business?

4

Check the competitors

Same counts for the three names customers compare you with.

Who closes this leak

1

Ask at the right moment, every time Rita

2

Draft thoughtful replies Rita

SEND THIS TO START

“Draft honest review requests for these five completed jobs: [names]. Their own words, no incentives, no scripted keywords - just make it easy to say yes.”

Five personal asks a week beat a quarterly blast, and honest reviews survive platform purges.

The diary tetris.

Booking a simple appointment can take several messages.

Multiply that by every customer, every week, and the diary becomes a part-time job nobody applied for.

What it looks like

The back-and-forth

'Tuesday?' 'No, Thursday?' 'Morning or arvo?' Four texts to land one slot - per customer.

Double-ups and gaps

Two jobs booked on top of each other, then a dead afternoon. The diary lives in your head until it doesn't.

No-shows with no warning

They forgot, you drove out anyway. Nobody sent a reminder because nobody had time.

The story we tell ourselves. 'It only takes a minute to sort the diary.' Thirty **times a day, plus the drive-bys when it goes wrong.**

What it costs: No-shows + message tetris + dead gaps. Ten minutes of arranging per booking, forty bookings a month, is nearly a working day.

Count it this week - Scheduling & bookings

1

Count the messages

Pick ten recent bookings. How many messages did each take to lock in?

2

Count the no-shows

Last month: how many booked slots never happened, and what did each cost in time or fuel?

3

Count the gaps

Hours lost to badly spaced jobs, drive time, and reworked days.

4

Write down your booking rules

Minimum notice, buffer times, areas, job lengths. Rules you can't write down **can't be automated.**

Who closes this leak

1

Bookings without the back-and-forth Paige

2

Appointments inside your rules Vera

SEND THIS TO START

“List this week's bookings, flag any clashes or tight drive-times, and draft reminder messages for each customer the day before their slot.”

Reminders are the cheapest no-show fix there is - and they only work if they actually go out.

The quoting backlog.

The site visit happened Tuesday. The quote is still in your head on

Friday. Speed wins work - the business that prices first usually gets the

job, and the backlog quietly hands it to someone else.

What it looks like

The Friday pile

Site notes, photos and

measurements pile up all week.

Quoting happens at night, or

doesn't.

Inconsistent prices

Same job, two different prices a

month apart. Without a price

book, every quote reinvents the

maths.

No record of what won

Which quotes converted and

which didn't - and why? Without

that, pricing is guesswork.

The story we tell ourselves. 'They know I'm busy, they'll wait.' They're

collecting two other prices while they wait.

What it costs: Quote lag x win-rate decay. A five-day quote tells the customer how the

rest of the job will run.

Count it this week - Quotes & proposals

1

Measure the lag

Last ten jobs: days from site visit to quote sent. The average is your leak.

2

Count the unquoted

Site visits or enquiries that never got a price at all.

3

Build the skeleton price book

Your ten most common jobs with a base price each. Rough is fine.

4

Track win rate

For one month, mark each quote won or lost. Watch the pattern emerge.

Who closes this leak

1

Chase the details, prep the draft Piper

2

Log every enquiry ready for quoting Vera

SEND THIS TO START

“From these job notes and photos, draft a quote using my price book: [notes].

Flag anything missing that I need to confirm before it goes out.”

You still set the price - the draft just stops the Friday pile from forming.

Burst, then silence.

Most small-business marketing runs on guilt: a burst of posts when

work is quiet, then silence for three months when you're flat out. The

algorithm, and your customers, read the silence.

What it looks like

The feast-famine feed

Five posts in one week, then

nothing until winter. Consistency

beats brilliance, and the burst

pattern is neither.

Marketing is the first thing

dropped

Busy week? Marketing waits. But

quiet weeks are caused by the

busy weeks when nobody

marketed.

No idea what worked

Some posts did well, once.

Nobody wrote down why, so it

never happened again.

The story we tell ourselves. 'I don't need to post, I'm busy.' The rhythm

exists for exactly those weeks - it keeps working when you can't.

What it costs: Shows up three months later as a quiet diary. Price your worst quiet week

last year.

Count it this week - Marketing rhythm

1

Audit the last 90 days

Count posts, emails, ads - anything outbound. Plot them by week. See the

gaps?

2

Match against revenue

Compare the marketing gaps with the quiet revenue weeks that followed.

3

Pick a survivable rhythm

One quality post a week, kept for a year, beats thirty posts in January.

4

Write down your three stories

What you do, proof it works, why you're different. Every post is one of these **three.**

Who closes this leak

1

Plan and draft the weekly rhythm Sofia

2

Graphics in your brand Drew

SEND THIS TO START

“Plan four weeks of posts for a [your business] in [your area]: one tip, one proof post, one customer story, one offer - drafts in my voice, nothing scheduled without my yes.”

A month of drafts in one pass. You approve each batch before anything goes out.

The shoebox system.

Customer details live in texts, notebooks, email threads and your memory. It works - right up until someone else needs to find something, or you need to contact everyone at once.

What it looks like

The scattered file

Phone number in a text, address in an email, job notes in your head. Every job starts with an archaeology dig.

No way to reach past customers

You did 200 jobs last year. Could you message all 200 this afternoon? That list is the cheapest marketing you own.

Knowledge walks out the door

When a staff member leaves, their version of where things are goes with them.

The story we tell ourselves. 'It's all in my head, and that works.' Until you're **sick, staff leave, or 200 past customers could fill next month.**

What it costs: Hides inside every other leak: no details, no follow-up, no review asks - marketing from zero every time.

Count it this week - Customer records

1

Pick ten past customers

Time yourself finding their full details and job history. Over two minutes each **is the leak.**

2

Count the unreachable

What share of past customers could you contact today, in one step?

3

Count the duplicates

Same customer in three places with three spellings. Duplicates quietly

wreck your numbers.

4

Decide the one home

One place where customer records live - a CRM, a spreadsheet, anything.

One.

Who closes this leak

1

Keep the CRM tidy Piper

2

Log every conversation once Vera

SEND THIS TO START

“From this list of past jobs, build a simple customer register: name, suburb, job type, date, contact. Flag duplicates and missing details for me to fill.”

One clean register turns 'the shoebox' into an asset - and every other playbook in this book uses it.

The ten-minute interruption.

Nobody steals an hour from a business owner. They steal ten minutes,

thirty times a day - and the jobs only you can do wait until tonight. This

pillar measures where your day actually goes.

What it looks like

Chief everything officer

Quoting, chasing, booking,

posting, reminding, paying. Every

small task is quick; the pile is not.

The evening shift

The real work - quotes, invoices,

planning - happens after dinner

because the day was spent

reacting.

No delegation map

Ask 'should I be doing this?' and

the honest answer, half the time, is

no. But there's no system to hand

it to.

The story we tell ourselves. 'It's quicker to do it myself.' True once. The

hundredth time, the maths has flipped.

What it costs: Thirty ten-minute interruptions is three-plus hours a day, plus refocus

time. Your hour is the priciest in the business.

Count it this week - Owner's time

1

Track three honest days

Note every task and its minutes. Not the ideal week - a real one.

2

Sort the pile three ways

Only I can do this / someone could with rules / this shouldn't exist at all.

3

Price your hour

Annual profit target divided by your working hours. Compare it to the tasks **in pile two.**

4

Pick the first handover

The task in pile two you hate most. That is the first thing this book takes off **you.**

Who closes this leak

1

One morning briefing, not forty pings Casey

2

Run the calendar, prep the meetings Paige

SEND THIS TO START

“Here is my three-day task log: [log]. Sort each task into 'only me', 'could be delegated with rules', or 'shouldn't exist' - and suggest the first five to hand over.”

The log doesn't lie. Most owners find a full working day a week in the 'delegable' pile.

Invoices that age quietly.

The work was done, the customer was happy, the invoice went out - and then nothing. Chasing money feels awkward, so it happens late or never, and the business acts as the customer's free bank.

What it looks like

The overdue total nobody knows

Ask for today's overdue figure out loud. If the answer takes more than a minute, that is the leak.

Awkward means late

Nobody chased it because chasing feels rude. The customer, meanwhile, just forgot.

Invoice day keeps slipping

Invoices go out in a batch at month's end - weeks after the work. Slow invoice, slow payment.

The story we tell ourselves. 'They'll pay eventually.' Mostly true - meanwhile **their unpaid invoice is your cash-flow problem.**

What it costs: Money in their account can't buy stock or pay wages. Every week an invoice ages, its odds of being paid drop.

Count it this week - Money in

1

State the overdue total

One number, today, out loud. Write it where you'll see it tomorrow.

2

Age the list

0-30, 30-60, 60+. The older the debt, the worse the odds - count each bucket.

3

Measure invoice lag

Last ten jobs: days from finished work to invoice sent.

4

Note the excuse log

Why wasn't each overdue invoice chased? 'Forgot' and 'awkward' are systems problems, not character flaws.

Who closes this leak

1

Polite chasing on a fixed rhythm Fiona

2

Books tidy, cash watched weekly Fiona

SEND THIS TO START

“Draft polite payment reminders for these overdue invoices: [list]. First reminder friendly, second firmer, third final - my name on them, sent only when I approve.”

A fixed chasing rhythm removes the awkwardness: it's not you being pushy, it's Tuesday's reminder going out on Tuesday.

PUT THIS BOOK TO WORK

Want this running in your business?

Want to see AI agents working in your business? Agents like Xpress AI Coworker are hands-on and proactive - they answer calls, sort inboxes and follow up leads while you approve every action - and you can try one out.

Book a free AI audit or strategy call to see how AI agents could be used in your business:

BOOK A FREE STRATEGY CALL >

xpressaicoworker.com | A$5 first month, then A$397/month | +61 422 829 644

The AI Receptionist.

Answers calls and enquiries around the clock once set up and connected, texts back missed calls, and logs every conversation for you. On the Xpress AI Co-Worker platform this role is Vera; the examples in this chapter use her.

Every call

logged with name, number and what they need - not scribbled on a receipt

Nights +

weekends

covered once the receptionist is set up and the phone connection is live

Your yes

anything off-script, outside your rules, or about pricing waits for you

What she is, what she isn't

Vera is

An always-on first answer, in your greeting, from your approved answers

A meticulous logger - every call, name, number and need in one place

A fast text-back for every missed call

Vera isn't

An expert in your trade - she works from answers you approve

A mind reader - anything off-
script is flagged, not guessed
A promise machine - pricing
and commitments wait for you

One co-worker, inside the apps you already use

Supplied Xpress deck artwork - a concept illustration, not product UI.

What the artwork is saying

Your customers already live in WhatsApp, SMS and your phone line. A co-worker like Vera sits inside those same channels - answering, logging and booking - instead of asking customers to learn a new app or portal.

How it maps to this chapter

Every job on the previous page - after-hours calls, missed-call text-back, enquiry capture, simple booking - happens in these everyday channels. The next pages show the exact rules and prompts that keep her inside your guardrails.

The point of the picture: the AI comes to where your customers already are. No new app for them, no new inbox for you - every conversation is logged in **one place you can actually check.**

The jobs Vera takes

After-hours & overflow calls

Answered within seconds while Vera is set up and the phone connection is live - nights,

weekends, smoko. Anything she cannot resolve is escalated to you or your team.

Missed-call text-back

The caller you couldn't reach gets an immediate, friendly text, so they stop dialling competitors.

Enquiry capture

Name, number, what they need, where they are - logged in one place, ready for quoting.

Simple booking

Where your calendar is connected, appointments land straight in, inside the rules you set.

A night with Vera

An illustrative night - the pattern the workflow aims for, not a customer result or a confirmed live run.

11:47 pm A hot-water system dies in Castle Hill. The owner calls your number.

11:47 pm Vera answers in seconds, in your greeting, from your approved answers.

11:49 pm Name, address, problem and photos requested - logged. The caller books the first morning slot.

11:50 pm One question about pricing is outside her rules - flagged for you, not guessed.

8:00 am One line in your morning briefing: "1 after-hours call - booked

The maths, honestly

Author-edition note: Ram Valia, founder of Xpress AI and author of this book. Start with a clear business goal.

Count one month of missed or badly handled enquiries. Multiply by your real conversion rate and a client's lifetime value. That is the potential lifetime revenue attached to one month's leaks - not cash arriving next month, and not profit.

Illustrative bar chart of recovered revenue scenarios

Illustrative figures, not a promise. Your conversion rate, LTV, capacity and recovery rate pull the real number up or down.

By hand, or with Vera

By hand With Vera

After-hours

call

Voicemail nobody checks

until Monday.

Answered in seconds, caller

texted and logged.

Enquiry

details

Scribbled on a receipt, half

legible.

Name, number, need and

suburb, logged once.

Follow-up When you remember, if you

remember.

Prepared on a schedule, sent

after your tap.

SEND THIS TO TRY IT

"Summarise every call and enquiry Vera handled this week: who called, what they needed, what was booked, and what's waiting on me."

One message shows you exactly what the receptionist did while you worked.

Set up in a week

1

Day 1 - Your answers

Your services, suburbs, prices-you-can-say and prices-you-can't, and your **greeting.**

2

Day 2 - The rules

What Vera may book, what she must escalate, and when to wake a human.

3

Day 3 - Connect

Phone answering and, if you want bookings, your calendar.

4

Day 4 - Test calls

You and a mate call in with the awkward questions. Fix what sounds off.

5

Day 5 - Live, listening

Real calls. You listen to the first handful of recordings and tighten the script.

Runs on its own

Answers from your approved

FAQ

Logs every conversation

Sends the text-back you pre-

approved

Books inside your rules

Needs your yes

Anything off-script

Price talk and promises

Bookings outside your rules

Complaints and unhappy

callers

Before you approve: in week one, listen to a handful of logged

conversations. Check the greeting sounds like your business, the questions capture what you need to quote, and hand-offs to you happen at the right **moment.**

Leak sealed: missed calls and slow response.

One briefing, not forty pings.

Every specialist reports to one place. Casey is that place - you ask once, the right specialist does the work, and one morning briefing tells you what happened. On the Xpress AI Co-Worker platform, Casey is the chief co-worker; the examples in this chapter use that role.

The jobs Casey takes

One front door

Ask in plain language - 'what happened overnight?' - and Casey routes it to the right specialist. No picking the right tool for every task.

The 8am briefing

One summary each morning: what came in, what was done, what needs your decision. Everything else stays out of your way.

Routing and hand-offs

A sales question goes to the pipeline, a design request to the studio, a review to reputation - without you playing traffic controller.

Works inside your gates

This book's pattern: nothing spends money, publishes, or contacts anyone without your approval. Part 3 shows how to set

those gates with your provider.

A day with Casey

6:58 am Overnight: 3 calls answered, 2 quotes chased, 1 bad review drafted a reply for, 4 invoices nudged.

7:00 am Your briefing lands. Three lines need a decision: a pricing question, a refund request, a big enquiry.

7:05 am You answer the three in one reply each. Everything else already has a status.

2:20 pm A supplier emails about stock. Casey files it under purchasing and flags only because it's urgent.

6:00 pm Tomorrow's briefing is already being assembled. Your evening is yours.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Casey

By hand	With the co-worker
Finding out what happened	Dig through five apps and forty notifications	One briefing, read in two minutes
Getting something done	Pick the right app, learn it, do it yourself	Ask once, in plain language
Decisions	Everything feels urgent, all day	Only genuine decisions reach you

Exact prompts for Casey's work

Send these as-is, swapping the [square brackets]. They are starting points - the

platform versions run with your business details already connected.

SEND THIS TO TRY IT

“Give me this morning's briefing: what came in overnight, what was handled, and the three things that genuinely need my decision.”

The two-minute morning read that replaces forty notifications.

SEND THIS TO TRY IT

“What did we miss this week? Any enquiry, follow-up, review or invoice that slipped - list them with the owner for each.”

The weekly gap-check that keeps small leaks small.

SEND THIS TO TRY IT

“Compare this week's briefing themes with last week's: what's recurring, what's growing, and what should become a standing rule instead of a weekly decision.”

Recurring decisions become rules - the briefing gets shorter as the system learns.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - Your gates

What always needs your yes: spending, publishing, pricing, complaints, **refunds.**

2

Day 2 - Your people

Who's on the team, who customers are, what a normal week looks like.

3

Day 3 - Connect the tools

Email, calendar, the channels you use. Read-only first.

4

Day 4 - First briefing

Review it together. Too much? Too little? Tune what earns a line.

5

Day 5 - Live rhythm

Briefing every morning, gaps every Friday. Adjust as you learn.

Runs on its own

Routes every request to the
right specialist
Assembles the morning briefing
Prepares everything for your
approval gates
Files and flags by your rules

Needs your yes

Every approval-gate decision
Changes to the gates
themselves
Anything involving money or
publishing

A feed that never goes quiet.

The weekly rhythm your marketing never keeps. Sofia plans and drafts your social posts in your voice, with graphics from Drew, and prepares the schedule - you approve every batch before anything goes out. On the Xpress AI Co-Worker platform this role is Sofia; the examples in this chapter use that role.

The jobs Sofia takes

The weekly plan

Four posts a week mapped to your three stories: what you do, proof it works, why you're different.

Drafts in your voice

Captions written from your past posts and how you actually talk - not generic marketing speak.

Graphics, on brand

Drew designs the images in your colours and style; Sofia pairs them with the words.

The approval batch

Everything lands as one weekly batch. Read, edit, approve - twenty minutes, not four hours.

A day with Sofia

Monday The week's four drafts arrive: one tip, one proof post, one customer story, one offer.

Monday You approve three, rewrite one line on the fourth, add a photo

from Friday's job.

Wednesday A comment asks about pricing. Flagged to you - pricing is always your call.

Friday A post about a tricky job gets shared twice. Sofia notes the pattern for next month.

Sunday The feed kept moving while you switched off. That's the whole point.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Sofia

By hand With the co-worker

Weekly posts

A burst when quiet, silence when busy

A rhythm that runs either way

Captions Stare at the phone for an hour Drafts in your voice, your edit

Graphics Canva roulette at 10pm On-brand, every time

Exact prompts for Sofia's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Plan four weeks of posts for a [your business] in [your area]: one tip, one proof post, one customer story, one offer - drafts in my voice, nothing scheduled without my yes.”

A month of drafts in one pass. You approve each batch before anything goes out.

SEND THIS TO TRY IT

“Write three captions for this job photo: [describe the job]. One educational, one story, one with a soft call to action - plain language, no buzzwords.”

Three angles on one job - pick the one that sounds like you.

SEND THIS TO TRY IT

“Look at our last twenty posts: which themes got the most reactions, and what should next month's plan do more of?”

Your own engagement history is the brief for next month.

The approval pattern never changes. Drafts and lists are prepared -

nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - Your three stories

What you do, proof it works, why you're different. Every post is one of these.

2

Day 2 - Your voice

Ten of your past posts or messages. Sofia learns your register.

3

Day 3 - Your brand

Logo, colours, style for Drew's graphics.

4

Day 4 - First batch

Four drafts reviewed. Edit until they sound like you.

5

Day 5 - Live rhythm

One batch a week, always gated by your approval.

Runs on its own

Plans the weekly calendar

Drafts captions in your voice

Pairs graphics from Drew

Notes what performed

Needs your yes

Every post before it's

scheduled

Pricing or offers in posts

Replies to comments and DMs

An inbox that's already sorted.

Email triage can easily eat an hour of a busy day - much of it deciding, not reading. Emily sorts overnight, drafts replies in your tone, and makes sure the important ones can't hide. On the Xpress AI Co-Worker platform this role is Emily; the examples in this chapter use that role.

The jobs Emily takes

Overnight triage

By morning: what's urgent, what's routine, what's noise. Newsletters filed, real mail surfaced.

Draft replies in your tone

Routine questions get a ready-to-send draft in your words. You read, tap, done.

Nothing important hides

Quote requests, complaints and legal letters get flagged - they can't sink below the fold.

Unsubscribe and file

The noise gets unsubscribed or filed by your rules, once, permanently.

A day with Emily

Overnight 142 emails arrive. Emily sorts: 6 urgent, 23 routine, 113 noise.

7:00 am Six flagged with context. Routine ones have drafts waiting.

9:00 am A customer asks about pricing - outside the rules, so flagged, not guessed.

12:30 pm A 'final notice' from a supplier is real, not spam. Flagged with the

account history attached.

6:00 pm The inbox is at zero-handled, not zero-unread-theatre:

everything has a state.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Emily

By hand With the co-worker

Morning

email

Forty-five minutes of scrolling Six flagged, drafts waiting

Routine

replies

Typed from scratch, every time Reviewed and tapped

Important

mail

Prays you spot it Flagged, can't hide

Exact prompts for Emily's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Sort this week's inbox: what needed me, what was routine, what was noise - and which senders should be muted or unsubscribed.”

The first sort shows how much of the inbox was never really yours to answer.

SEND THIS TO TRY IT

“Draft a reply to this customer email in my tone: [paste]. Answer their actual question in three sentences, no waffle.”

Tone-matched drafts for routine replies - you still read every send.

SEND THIS TO TRY IT

“List the ten senders who email me most, how many of their emails were actually urgent, and which ones to file or mute.”

The loudest senders are rarely the important ones - this proves it with your own mail.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - Your rules

What counts as urgent: quote requests, complaints, legal, key customers.

2

Day 2 - Your tone

Emails you've sent. Emily learns short-and-warm versus formal-and-detailed.

3

Day 3 - Connect

Read access to the inbox. Nothing sends yet.

4

Day 4 - Draft review

First triage and drafts checked. Tune the flags until you trust them.

5

Day 5 - Live

Overnight sorts, morning flags, drafts for the routine - all reviewed by you.

Runs on its own

Sorts overnight by your rules

Drafts routine replies in your tone

Flags anything urgent or unusual

Files and unsubscribes per your list

Needs your yes

Every reply before it sends

New flag rules

Anything legal, financial or angry

Named when customers ask.

Being good isn't enough if Google Maps and AI assistants don't know it. Marco keeps your Google Business Profile current and checks whether AI assistants name you - with honest readings, not ranking promises. On the Xpress AI Co-Worker platform this role is Marco; the examples in this chapter use that role.

The jobs Marco takes

Google Business Profile, current

Hours, services, photos, posts, Q&A - kept fresh, because stale profiles slide.

AEO checks

Asks the major AI assistants who they recommend in your niche and area - and records whether you're named and what they say.

Content that answers

Wes writes the FAQ and service pages assistants can quote; Marco makes sure the questions match what customers actually ask.

Monthly re-measure

Same checks, same searches, tracked month over month. A trend line, not a guess.

A day with Marco

1st of month The AEO check runs: five customer questions asked across three assistants. Results logged.

Week 1 Two assistants name a competitor for 'emergency [trade] near me' but not you. Gap noted.

Week 2 Profile updated: new photos, a post, winter hours corrected.

Week 3 Wes drafts an FAQ page answering the exact questions assistants got asked.

Month end The trend: named in 2 of 15 checks last month, 5 of 15 this month. Progress, not promises.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Marco

	By hand	With the co-worker
Google profile	Touched once, years ago	Current, every month
AI assistants	No idea what they say about you	Checked and logged monthly
SEO content	A homepage and a prayer	FAQ pages that answer real questions

Exact prompts for Marco's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Ask ChatGPT, Gemini and Perplexity: who are well-reviewed [your service] businesses in [your suburb]? Report whether I'm named, what they say about me, and what they say about my top three competitors.”

A snapshot of whether assistants name you - a reading to re-check monthly, not a ranking promise.

SEND THIS TO TRY IT

“List the ten questions customers most ask a [your business], and draft clear two-paragraph answers I can put on my website.”

Assistants quote clear answers. These become your FAQ page.

SEND THIS TO TRY IT

“Audit my Google Business Profile from this [paste/screenshot]: what's missing, what's stale, and the five fixes that matter most.”

Five concrete fixes beat 'improve your SEO' every time.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - The baseline

The three searches, screenshotted. Where you stand today.

2

Day 2 - The profile

Every field of your Google Business Profile reviewed and completed.

3

Day 3 - The questions

The ten real questions your customers ask, listed.

4

Day 4 - The content plan

Which answers become pages - Wes writes, you approve.

5

Day 5 - The rhythm

Monthly checks logged, profile kept current, trend reviewed.

Runs on its own

Keeps the profile current

Runs and logs the monthly checks

Spots the gaps assistants have

Coordinates content with Wes

Needs your yes

Anything published to your profile or site

Claimed rankings or guarantees - nobody honest offers them

Your real business details

T H E S P E C I A L I S T R O L E S · C O - W O R K E R 6 O F 1 2

Asked at the right moment.

Happy customers almost never review unasked. Rita asks them honestly at the right moment and drafts thoughtful replies to every review - so your online reputation finally matches your real one. On the Xpress AI Co-Worker platform this role is Rita; the examples in this chapter use that role.

The jobs Rita takes

Ask honestly, every time

Completed jobs get a personal review request in your words - no incentives, no scripts, no keyword-stuffing.

Reply to every review

Five stars or one star, a thoughtful reply drafted for your approval. Future customers read the replies.

Spot the patterns

What reviewers praise and what they raise - fed back as plain-English notes you can act on.

Watch the platforms

Google, Facebook and the places your customers actually look, checked on a rhythm.

A day with Rita

Tuesday Three jobs completed. Three personal requests drafted - each mentions the actual job.

Tuesday You approve all three in a minute.

Thursday A 5-star review lands, mentioning the punctual arrival. Thank-you

reply drafted.

Friday A 3-star review mentions communication. Reply drafted:

acknowledge, explain, invite a call. You approve.

Month end Review count and rating logged against last month. The trend is

the truth.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Rita

By hand With the co-worker

Asking for

reviews

Never, or a mass blast Personal, after every job

Replies Silence, or a defensive rant at

midnight

Thoughtful, drafted,

approved

Reputation A small, unrepresentative slice The real business, visible

Exact prompts for Rita's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Draft honest review requests for these five completed jobs: [names + jobs]. Their own words, no incentives, no scripted keywords - just make it easy to say yes.”

Five personal asks a week beat a quarterly blast, and honest reviews survive platform purges.

SEND THIS TO TRY IT

“Draft a reply to this 3-star review: [paste]. Acknowledge the issue, don't argue, invite them to call me directly. Professional and short.”

The reply is for the hundred future readers, not the reviewer.

SEND THIS TO TRY IT

“Summarise our last twenty reviews: the three things customers praise most and the two complaints that keep recurring.”

Your review history is free consulting - the patterns tell you what to fix and what to sell.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - The count

Reviews today: count, rating, newest date. The baseline.

2

Day 2 - Your words

How you actually thank customers. Rita learns the tone.

3

Day 3 - The ask

Your request template: personal, honest, one tap to the review page.

4

Day 4 - Reply rules

How you want complaints handled: acknowledge, explain, invite offline.

5

Day 5 - Live rhythm

Requests after every job, replies drafted same-week, all approved by you.

Runs on its own

Drafts requests after
completed jobs

Drafts replies to every review

Tracks count and rating monthly

Surfaces praise and complaint
patterns

Needs your yes

Every request and reply before
it sends

Anything offering incentives -
most platforms ban it

Public responses to angry
reviews

Every quote gets a second ask.

The follow-up you'd do if there were 48 hours in a day. Piper keeps every lead moving - second and third touches in your words, cold enquiries revived, the pipeline tidy. On the Xpress AI Co-Worker platform this role is Piper; the examples in this chapter use that role.

The jobs Piper takes

Second and third touches

Every quote and proposal gets followed up on your schedule, in your tone, prepared for your approval.

Cold-file revival

Enquiries from months ago get a warm, low-pressure check-in - the cheapest new work you'll ever win.

Pipeline tidy-up

Every lead has a status and a next step. Nothing sits in 'maybe' for six months.

Win/loss notes

Why jobs were won and lost, logged - so pricing and follow-up get smarter every month.

A day with Piper

9:00 am Three quotes sent last week haven't moved. Follow-ups drafted for your approval.

9:10 am You tap approve on two, edit one line on the third. Done.

1:30 pm A cold enquiry from March replies: 'actually yes, can you quote?' Flagged to you at once.

4:00 pm Today's new enquiry is logged with source, value and next step - no spreadsheet archaeology.

Friday The pipeline report: what moved, what's stuck, what's dead and why.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Piper

By hand With the co-worker

Quote

follow-up

When someone

remembers, if ever

On a schedule, in your words,

after your tap

Cold

enquiries

Gather dust in a

spreadsheet

Warm check-ins on a rhythm

Pipeline

status

'I think it's fine?' Every lead has a next step

Exact prompts for Piper's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Draft a follow-up for [name], who enquired about [job] on [date] and hasn't booked. Warm, short, no pressure - one question that makes it easy to reply.”

Second touches in your words. Nothing sends without your approval.

SEND THIS TO TRY IT

“List every open quote older than 5 days, newest first, with a suggested next touch for each.”

The weekly follow-up list, without the spreadsheet dig.

SEND THIS TO TRY IT

“Show me this month's win/loss notes: which jobs we won, which we lost, and the pattern in the losses I can actually fix.”

Losses cluster - price, speed, or silence. The pattern tells you which lever to pull.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - Your tone

Three follow-ups you've actually sent. Piper learns the voice, not a template.

2

Day 2 - Your rhythm

When touches go: day 3, day 7, day 14 - your call, your rules.

3

Day 3 - The pipeline

Current quotes and leads loaded, each with a status.

4

Day 4 - Draft review

First batch of follow-ups drafted. You edit until they sound like you.

5

Day 5 - Live

Follow-ups prepared on schedule, every one gated by your approval.

Runs on its own

Tracks every lead and its next step

Drafts follow-ups on your rhythm

Flags replies the moment they land

Keeps win/loss notes

Needs your yes

Every message before it sends

Discounts or price changes

Any contact who says stop

Referrers who remember you.

For businesses that live on referrals - agents, brokers, accountants, suppliers - the work goes to whoever stays visible. Lia finds the right people and keeps your name in front of them, professionally. On the Xpress AI Co-Worker platform this role is Lia; the examples in this chapter use that role.

The jobs Lia takes

Find the right people

Decision-makers and referrers in your niche and area, researched and listed - not bought lists, real fit.

Draft personal outreach

Messages about their business, not a brochure about yours. You approve every batch before anything sends.

Keep LinkedIn alive

Weekly posts in your voice on your page - consistent presence without the Sunday-night writing session.

Watch for openings

Referrers' news, moves and milestones - natural reasons to reconnect, surfaced for you.

A day with Lia

Monday Ten referrer candidates researched: why each fits, what to say, drafted for your review.

Tuesday You approve six, bin four. Approved outreach goes out under your name.

Wednesday A broker you met in winter posts about a big win. A congrats note is drafted - one tap.

Thursday Two replies. Both flagged with context and suggested responses.

Friday This week's LinkedIn post is drafted in your voice. You edit two lines, approve.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Lia

By hand	With the co-worker
Finding referrers	Researched list with reasons
Outreach	Copy-paste brochure nobody reads	Personal drafts, your yes first
LinkedIn	A post every three months	Weekly, in your voice

Exact prompts for Lia's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Draft a LinkedIn post for a [your business] about [topic]: one useful lesson, plain English, no buzzwords, ending with a question.”

Useful beats promotional. Educational posts build the presence referrers remember.

SEND THIS TO TRY IT

“Research ten potential referrers for a [your business] in [area]: who they are, why they'd refer, and one personal opening line for each.”

A researched list beats a bought list every time - and you approve every message.

SEND THIS TO TRY IT

“Draft three reconnect messages for referrers I haven't spoken to in 90 days - each about something specific to them, no pitch.”

Reconnection works when it's about them. Three a week keeps the network warm.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - Your niche

Who refers you work today, and who should. The target list starts here.

2

Day 2 - Your voice

Posts and messages you've written. Lia learns your register.

3

Day 3 - The first list

Twenty candidates researched and ranked with reasons.

4

Day 4 - Draft review

First outreach batch and LinkedIn post. Edit until they're yours.

5

Day 5 - Live rhythm

Weekly: one post, one outreach batch, one reply roundup - all gated.

Runs on its own

Researches and ranks candidates

Drafts outreach and posts in your voice

Watches for reconnect moments

Tracks replies

Needs your yes

Every message and post before it sends

Connection requests under your name

Anything that smells like a

commitment

Money chased without the awkward.

The work was done, the invoice went out - and then silence. Fiona keeps the books tidy, watches cash flow weekly, and drafts polite payment chasers on a fixed rhythm, so 'awkward' stops costing you money. On the Xpress AI Co-Worker platform this role is Fiona; the examples in this chapter use that role.

The jobs Fiona takes

Polite chasing, on rhythm

First reminder friendly, second firmer, third final - drafted in your name, sent only when you approve.

The overdue number

Today's overdue total, aged by bucket, one glance. No more guessing.

Books kept tidy

Transactions matched and tidied in your accounting software, ready for your bookkeeper or accountant.

Weekly cash watch

What came in, what's owed, what's late - one short summary, every week.

A day with Fiona

Monday The cash summary: in, out, overdue. Three invoices crossed 30 days.

Monday Three first-reminders drafted, friendly. You approve all three.

Wednesday Two pay after the reminder. Most people just forgot - that's normal.

Thursday One hits 45 days. Second reminder drafted, firmer. You approve.

Friday The overdue total is down a third on the month. The rhythm works because it's boring.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Fiona

By hand With the co-worker

Chasing

invoices

When it gets too awkward to

avoid

A fixed polite rhythm, your

tap

The overdue

total

'Let me check and get back to

you'

One number, always current

Books A shoebox and a guilty

accountant

Tidy, matched, ready

Exact prompts for Fiona's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Draft polite payment reminders for these overdue invoices: [list]. First reminder friendly, second firmer, third final - my name on them, sent only when I approve.”

A fixed chasing rhythm removes the awkwardness: it's Tuesday's reminder going out on Tuesday.

SEND THIS TO TRY IT

“Summarise my cash position from these figures: what came in this month, what's overdue and aged how, and what bills are due before it arrives.”

The one-page cash picture most owners avoid until it's a crisis.

SEND THIS TO TRY IT

“List my overdue invoices by age and size, and suggest the chase order - biggest and oldest first, with a note on each customer relationship.”

Chase order is judgment: the big corporate account and the struggling local get different handling.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - The number

Today's overdue total, aged. Uncomfortable and necessary.

2

Day 2 - Your terms

Payment terms, late fees if any, and your reminder sequence.

3

Day 3 - Connect the books

Your accounting software linked, read-first.

4

Day 4 - Draft review

First reminder batch drafted. Tune the tone until it's yours.

5

Day 5 - Live rhythm

Weekly cash summary, chasers on schedule, every one approved.

Runs on its own

Ages and lists the overdue

Drafts the reminder sequence

Keeps the books tidy

Sends the weekly cash

summary

Needs your yes

Every reminder before it sends

Payment plans or write-offs

Any change to terms

The diary runs itself.

Booking one meeting can take several messages; a week of them is a part-time job. Paige runs the calendar inside your rules, kills the back-and-forth, and preps you before every call. On the Xpress AI Co-Worker platform this role is Paige; the examples in this chapter use that role.

The jobs Paige takes

Booking without back-and-forth

Your availability rules, buffers and limits set once - people pick a slot, the diary fills itself.

Reminders that cut no-shows

Every booking confirmed and reminded the day before, automatically, in your words.

Meeting prep

Before each call: who they are, the history, last notes, and the three things to cover.

Protect the deep work

Blocked focus time that bookings can't eat. The urgent stuff gets slots; the rest waits.

A day with Paige

8:00 am Today's run sheet: four appointments, drive times flagged, one tight gap warned.

10:15 am A customer wants Thursday. They get the booking link; the slot lands inside your rules.

12:00 pm Tomorrow's site visit gets the prep note: quote history, photos from last job, the open question.

3:40 pm A reschedule request arrives. Handled within the rules - no four-message dance.

4:55 pm Tomorrow's reminders go out. No-shows get rarer when reminders are automatic.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Paige

	By hand	With the co-worker
Booking a slot	Several messages, two days	One link, one minute
No-shows	Discovered at the door	Reminded the day before
Meeting prep	Scroll old emails in the car park	One note, ready before the call

Exact prompts for Paige's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“List this week's appointments, flag any clashes or tight drive-times, and draft reminder messages for each customer the day before their slot.”

Reminders are the cheapest no-show fix there is - and they only work if they go out.

SEND THIS TO TRY IT

“Draft my prep note for tomorrow's [meeting]: who they are, our history, open items, and the three things I should cover.”

Walking in prepared is the cheapest professionalism there is.

SEND THIS TO TRY IT

“Here are my scheduling rules: [rules]. Turn them into a booking page description

that sets expectations clearly.”

Rules written clearly are rules people actually follow.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - Your rules

Availability, buffers, minimum notice, job lengths, areas.

2

Day 2 - The calendar

Connected, read-first. Existing bookings respected.

3

Day 3 - The booking flow

Link or message flow tested with a mate, end to end.

4

Day 4 - Prep notes

What a useful prep note looks like for your meetings.

5

Day 5 - Live

Bookings flow in, reminders flow out, prep notes land - all inside your rules.

Runs on its own

Books inside your rules

Sends confirmations and reminders

Prepares meeting notes

Flags clashes and tight gaps

Needs your yes

New booking types or changed rules

Anything outside the rules

Cancellations with fees or relationships at stake

Content that answers questions.

Every week, customers type the same questions into Google and AI assistants. Wes writes the pages that answer them - in your voice, from your expertise, for your approval - so your business becomes the answer. On the Xpress AI Co-Worker platform this role is Wes; the examples in this chapter use that role.

The jobs Wes takes

Answer the real questions

The ten questions customers actually ask, turned into clear pages and posts assistants can quote.

Drafts in your voice

Your knowledge, your register - Wes structures and drafts, you correct and approve.

Feed the other channels

One good answer becomes a page, a post for Sofia, and a talking point for Lia's LinkedIn.

Keep it current

Prices change, rules change, seasons change - old pages get flagged for refresh, not left to rot.

A day with Wes

Week 1 The question list: what customers asked this month - calls, emails, the AEO checks.

Week 2 'How much does [service] cost in [area]?' drafted - honest

ranges, your numbers, your edit.

Week 3 You approve the page. Sofia turns it into two posts; Lia gets a LinkedIn angle.

Week 4 A supplier changed their pricing - the cost page is flagged for an update.

Month end The content ledger: what's live, what's drafting, what's stale. One page a week compounds.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Wes

By hand With the co-worker

Answering customer questions

Same answer typed fifty times

One good page, quoted everywhere

Website content

A homepage and a prayer A growing library of real answers

Expertise Locked in your head Published, findable, working for you

Exact prompts for Wes's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“List the ten questions customers most ask a [your business], and draft clear two-paragraph answers I can put on my website.”

These become your FAQ page - and the text AI assistants quote.

SEND THIS TO TRY IT

“Draft a 600-word page answering 'how much does [service] cost in [area]?': honest ranges, what changes the price, no sales fluff. I'll add my real numbers.”

Pricing pages are the most-read and least-written pages in small business.

SEND THIS TO TRY IT

“Turn this job story into a short case write-up: [details]. Problem, approach, result, one lesson - in my voice.”

Real jobs are your best content. One a month is a library in a year.

The approval pattern never changes. Drafts and lists are prepared - nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - The question list

What customers actually ask, gathered from your calls and inbox.

2

Day 2 - Your voice

Writing you've done - quotes, emails, posts. Wes learns the register.

3

Day 3 - First draft

One answer page, drafted and edited together.

4

Day 4 - The pipeline

The next ten pages queued in priority order.

5

Day 5 - Live rhythm

One page a week drafted for your approval; stale pages flagged monthly.

Runs on its own

Drafts answer pages in your voice

Queues topics by customer demand

Feeds posts to Sofia and Lia

Flags stale content monthly

Needs your yes

Every page before it publishes

Your real numbers and details

Anything technical that needs

your sign-off

On-brand, every time.

Good design used to mean a designer on retainer or Canva roulette at 10pm. Drew drafts on-brand graphics for posts, ads, flyers and offers - always in your colours and style, always for your approval. On the Xpress AI Co-Worker platform this role is Drew; the examples in this chapter use that role.

The jobs Drew takes

Post graphics

Sofia's captions get matching visuals in your brand - no more mismatched clip art.

Ads and offers

Creative variations for campaigns, drafted for your approval before a dollar is spent.

Flyers and one-pagers

The fridge-magnet flyer, the quote leave-behind, the price list - consistent, printable.

Brand consistency

Colours, fonts, logo use - one style, everywhere, even when you're in a hurry.

A day with Drew

Monday Sofia's four approved posts need graphics. Four drafts in your brand arrive.

Monday You approve three, ask for a warmer photo treatment on the fourth.

Wednesday The winter special needs a flyer. Two variations drafted, you pick

one.

Thursday An ad variation is drafted for the campaign you're considering -

not launched, just ready.

Friday The month's visuals are filed and reusable. Next month starts

from strength.

An illustrative day - the pattern the workflow aims for, not a customer result or a confirmed live run.

By hand, or with Drew

By hand With the co-worker

Post

graphics

Canva roulette, different every

time

One brand, every time

Ad creative One guess, live with your

money

Variations drafted before

spend

Flyers Wordart special, 2019 edition Clean, printable, consistent

Exact prompts for Drew's work

Send these as-is, swapping the [square brackets]. They are starting points - the **platform versions run with your business details already connected.**

SEND THIS TO TRY IT

“Describe three graphic concepts for a [your business] post about [topic]: layout, colours, and text on the image - in a clean trade-business style.”

Concepts first, then render - you pick the direction before anyone polishes pixels.

SEND THIS TO TRY IT

“Draft the text and layout for a one-page flyer: [offer details]. Headline, three benefits, one call to action, my phone number.”

A flyer brief tight enough to design from in one pass.

SEND THIS TO TRY IT

“Here are my brand colours and logo: [details]. List five design rules my graphics should always follow.”

Five written rules keep every future graphic on-brand without a brief each time.

The approval pattern never changes. Drafts and lists are prepared -

nothing is sent, published, or committed without your tap.

Set up in a week

1

Day 1 - Your brand

Logo, colours, fonts, examples of what you like.

2

Day 2 - The rules

Your five design rules, written down once.

3

Day 3 - First set

Graphics for this week's posts, drafted and reviewed.

4

Day 4 - Templates

Your recurring formats: post, offer, flyer.

5

Day 5 - Live rhythm

Graphics drafted with each content batch, always approved by you.

Runs on its own

Drafts graphics in your brand

Prepares ad creative variations

Keeps templates and assets

filed

Pairs with Sofia's calendar

Needs your yes

Every visual before it publishes

New logo or brand changes

Anything printed or paid for

Ads that start as drafts.

Meta ads work for local business when the creative is honest and the targeting is tight - and they burn money the moment nobody's watching. This chapter sets up the loop where agents prepare everything and you approve before a dollar moves.

What you're actually setting up

What ads can do for a local business

Put your best proof in front of people in your service area who look like your best customers. Nothing more mystical than that.

What they can't do

Fix a weak offer, a dead phone line, or a business that doesn't follow up. Ads amplify what's already there - leaks included.

The money rule

Budget caps live in the ad platform, set by you, as the advertiser of record. Agents draft; only you launch.

The creative truth

Real photos of real jobs outperform stock every time. Your camera roll is the creative department.

Set it up, step by step

1

The offer

One clear offer for one clear audience. 'We exist' is not an offer.

2

The account

Meta Business account in your name, ad account yours, payment method yours. Budget cap set by you.

3

The creative batch

Agents draft: five photo-based ad variations - headline, primary text, call to **action. You pick two.**

4

The small test

A small daily cap for two weeks. The target to measure: cost per enquiry, not **likes.**

5

The weekly review

Agents pull the numbers into your briefing and flag underperformers with **recommended changes. You decide.**

By hand, or with agents

By hand With agents

Creative One guess, live with

your money

Five drafts, you pick two

Watching

spend

Find out at the

statement

Weekly digest, caps you set

Improving Vibes Kill what's measured weak, back

what's measured strong

Exact prompts for this work

Send these as-is, swapping the [square brackets].

DRAFT AD CONCEPTS

“Draft five Facebook ad variations for a [your business] in [your area] offering [offer]: headline, 2-sentence primary text, call to action. Plain language, no hype.”

Five drafts to pick two from - you choose, you launch, you cap the budget.

WEEKLY REVIEW

“Here are this week's ad metrics: [paste]. Which ads are below our cost-per-enquiry target, and what specific change do you recommend for each?”

Recommendations, not actions - the decision and the budget stay with you.

AUDIENCE CHECK

“Describe three target audiences for [offer] in [area]: who they are, what they care about, and what proof would move each one.”

Audience thinking before spend - the ad is easy, the targeting is the craft.

The approval line

Every creative goes through you before launch; budget caps live in your ad account and only your hand changes them. Agents that spend unsupervised are how small budgets become big regrets.

The operating checks

Agents prepare

Ad concepts, copy and creative variations

Audience research and recommendations

Weekly performance digests with flagged changes

You approve

Launch, budget changes, and every dollar

Final creative approval

Any claim about results before the numbers exist

The mistakes that cost real money

Budget cap set in the platform by you, before anything runs

You're the advertiser of record - agents never hold the card

Cost per enquiry reviewed weekly against your target

Every creative approved by you before launch

Underperformers killed on evidence, not hope

Boosting random posts instead of running one measured test

Judging ads on likes instead of cost per enquiry

Letting a test run for months because nobody scheduled the review

Found when they're ready.

Google Ads catches people at the exact moment they search for what you sell. Intent is expensive, so precision matters more than budget - and the same rule holds: agents prepare, you approve, caps stay with you.

What you're actually setting up

Why search is different

Nobody scrolls Google for fun. A searcher typing 'emergency plumber Blacktown' is a buyer today - that's worth paying for, precisely.

The three levers

Keywords (what they type), the ad (what you promise), the landing page (what they find). Weak anywhere leaks money everywhere.

What to measure

Cost per booked job - via call tracking or a simple 'how did you hear about us' habit. Clicks are vanity; enquiries are sanity.

The honest warning

Google will happily spend any budget on broad keywords. Tight phrase lists and negative keywords are the discipline.

Set it up, step by step

1

The keyword list

Agents draft: 15-25 tight phrases buyers actually type, plus a negative list **(jobs you don't want).**

2

The account

Google Ads in your name, card yours, daily cap set by you as advertiser of **record.**

3

The ads

Three responsive search ad drafts per service: headlines that answer the **search, not slogans. You approve.**

4

The landing page

One page per service that answers the searcher's question fast - Wes can **draft it.**

5

The review rhythm

Weekly: search terms report checked, negatives added, waste cut. Agents **prepare the list; you confirm.**

By hand, or with agents

By hand With agents

Keywords Everything broad, budget

bleeds

Tight phrases, negative list

maintained

Adwriting One generic ad Three drafted per service,

approved

Knowing it

works

'The phone rings more, I

think'

Cost per booked job, tracked

Exact prompts for this work

Send these as-is, swapping the [square brackets].

KEYWORD DRAFT

Author-edition note: Ram Valia, founder of Xpress AI and author of this book. Keep evidence and approval with the work.

“Draft 20 search keywords for a [your service] business in [your area]: buyer-intent phrases only, plus 15 negative keywords to exclude tyre-kickers.”

The tight list is the whole game - broad keywords are where budgets go to die.

AD DRAFT

“Write three Google search ads for [service]: 5 headlines (30 characters) and 2 descriptions (90 characters) each, answering the searcher's actual question.”

Character-tight drafts ready to paste after your edit.

WASTE AUDIT

“Here is this week's search-terms report: [paste]. Which terms wasted money, and which should become negatives?”

The weekly waste audit is the highest-value ten minutes in paid search.

The approval line

Launch, budget and bids are yours alone. Agents draft keywords, ads and waste audits - the platform settings stay in your hands.

The operating checks

Agents prepare

Keyword and negative-list drafts

Ad copy variations

Weekly waste audits with recommendations

You approve

Launch, budget and bid changes

Final approval of every ad

Landing page sign-off

The mistakes that cost real money

Daily budget cap set by you in the platform

Search-terms report reviewed weekly - waste cut

Cost per booked job tracked, not clicks

Every keyword and ad approved before launch

No 'guaranteed position one' promises - nobody honest sells that

Bidding on broad one-word keywords because the volume looks exciting

Skipping the negative list, then paying for searches you never wanted

Measuring clicks because they're easy instead of enquiries because they **matter**

The answer, not the ad.

SEO gets you found in search results; AEO gets you named when customers ask AI assistants who to call. Both run on the same fuel: a complete profile, genuine reviews, and clear answers on your website. This chapter builds that engine honestly - no placement promises.

What you're actually setting up

What search engines reward

Complete, current business information; pages that answer real questions; genuine reviews; other sites referencing you. No tricks survive.

What AI assistants quote

Clear, specific, structured answers - FAQ pages, service pages, consistent details everywhere your name appears.

Why it compounds

Ads stop the day you stop paying. A good answer page works for years. Slow, then sudden.

The honesty rule

Nobody can promise rankings or assistant placements. What you can do: be the clearest, most complete answer in your area, and measure monthly.

Set it up, step by step

1

The baseline

Marco's three searches: Google, Maps, one AI assistant. Screenshot and

date them.

2

The profile

Google Business Profile completed fully - hours, services, photos, posts.

The single highest-value hour in local search.

3

The answer pages

The ten real customer questions, one page each, drafted by Wes, approved

by you.

4

The consistency pass

Name, address, phone identical everywhere: website, profile, Facebook,

directories.

5

The monthly measure

Same searches, same assistants, logged. The trend line is the truth.

By hand, or with agents

By hand With agents

Google

profile

Set once, forgotten Complete and current

Website

answers

'Services' page, four bullet

points

Real questions, real answers

Progress 'SEO is a mystery' Monthly readings, same

questions

Exact prompts for this work

Send these as-is, swapping the [square brackets].

AEO CHECK

“Ask ChatGPT, Gemini and Perplexity: who are well-reviewed [your service] businesses in [your suburb]? Report whether I'm named, what they say about me,

and what they say about my top three competitors.”

A snapshot of whether assistants name you - a reading to re-check monthly, not a ranking promise.

ANSWER DRAFT

“Draft a clear two-paragraph answer to '[customer question]' for my website -

specific, plain English, no filler.”

Assistants quote clear answers. Vague marketing copy gets skipped.

CONSISTENCY AUDIT

“Here are my business details as they appear in five places: [paste]. Flag every

inconsistency in name, address, phone, hours or services.”

Inconsistent details confuse both search engines and assistants - the cheapest fix in this book.

The approval line

Everything published is approved by you first. Agents draft pages and run monthly readings; nobody promises rankings or assistant placements - you measure and improve.

The operating checks

Agents prepare

Monthly AEO readings and logs

Answer-page drafts

Consistency audits

Profile update drafts

You approve

Everything published

Your real business details

Patience - quarters, not days

The mistakes that cost real money

Baseline screenshots dated and filed

Profile 100% complete - every field

Ten answer pages live, in your voice

Details identical across every listing

Monthly readings logged - trend reviewed, not vibes

Paying for "guaranteed first page" schemes

Writing pages for algorithms instead of answering real questions

Checking once and declaring SEO "doesn't work" after three weeks

Your reputation, on the record.

Reviews are the proof every other chapter leans on: ads point at them, assistants quote them, customers believe them. This chapter builds the honest engine - ask every happy customer, answer every review, measure the trend. No incentives, no filters, no games.

What you're actually setting up

Why reviews compound

Each review makes the next customer likelier to call - and likelier to review. The flywheel is slow to start and hard to stop.

The honest ask

Personal, specific, easy. 'If you've got sixty seconds, a review helps locals find us' - sent right after a job well done.

Replying is for the readers

Your reply to a bad review isn't for the reviewer. It's for the hundred future customers deciding whether you're reasonable.

What platforms ban

Incentivised reviews, review gating (asking only happy customers privately), staff reviews. Shortcuts that burn the whole profile when caught.

Set it up, step by step

1

The baseline

Count, rating, newest review date - on Google and Facebook. The starting **measurement.**

2

The ask

Rita's template: personal, job-specific, one tap to the review page. Approved by you.

3

The rhythm

Requests drafted after every completed job. You approve the batch.

4

The reply habit

Every review answered within days - thanks for the good, acknowledge-invite-offline for the bad.

5

The monthly read

Count and rating trend, plus the praise/complaint patterns fed back into the **business.**

By hand, or with agents

By hand	With agents
Asking	Never, or an annual blast
	Personal, after every job
Bad reviews	Argued with, or ignored
	Acknowledged, answered, moved offline
The trend	Unknown
	Counted monthly, acted on

Exact prompts for this work

Send these as-is, swapping the [square brackets].

THE ASK

“Draft honest review requests for these five completed jobs: [names + jobs]. Their own words, no incentives, no scripted keywords - just make it easy to say yes.”

Five personal asks a week beat a quarterly blast, and honest reviews survive platform purges.

THE REPLY

“Draft a reply to this review: [paste]. Thank them, acknowledge the specific point, invite offline contact if it's negative. Short, human, no defensiveness.”

Professional replies read well to the hundred people who never write one.

THE PATTERN

“Summarise our last twenty reviews: top three praises, top two complaints, and one operational change each complaint suggests.”

Reviews are free consulting - this turns them into a to-do list.

The approval line

Every request and reply sends only after your approval. Reviews are real customers in their own words - no incentives, no gating, no staff accounts, ever.

The operating checks

Agents prepare

Request drafts after each job

Reply drafts for every review

Monthly trend and pattern reports

You approve

Every request and reply before it sends

Public responses to angry reviews

Any dispute with a platform

The mistakes that cost real money

Requests going out after every completed job

Every review answered - good and bad

No incentives, no gating, no staff reviews, ever

Monthly count and rating logged

Complaint patterns turned into fixes

Offering discounts for reviews - platforms ban it and customers smell it

Arguing with bad reviews in public instead of acknowledging and moving **offline**

Asking once a year in a blast instead of after every good job

The website that answers back.

Half your website visitors arrive after hours, ask one question, and leave when nobody answers. An AI chat trained on your approved answers catches them. This chapter sets it up with the discipline that matters: it only knows what you taught it, and everything else goes to a human.

What you're actually setting up

What it's for

Instant answers to the questions your website already gets: prices-you-can-say, areas, hours, booking. Captured details instead of bounced visitors.

What it's not for

Advice, diagnosis, negotiation, or anything outside its approved material. The honest answer to a hard question is a handover.

The training rule

It answers from your FAQs, services, suburbs and fees-you-can-say. You review transcripts weekly and correct what it got wrong.

The capture

Name, number, what they need - logged for follow-up, even when the answer was 'a human will call you'.

Set it up, step by step

1

The approved answers

Your twenty real questions with your real answers - this is the whole brain.

2

The boundaries

What it must never do: quote final prices, give professional advice, argue.

Handover phrases set.

3

The install

Chat widget on the site, connected to your enquiry log so captures land

where Vera's calls do.

4

The test week

You and your team ask it the awkward questions. Fix what sounds off before

strangers see it.

5

The weekly review

Transcripts skimmed, wrong answers corrected, capture rate measured.

By hand, or with agents

By hand With agents

After-hours

visitor

Reads, leaves, forgets Answered, captured, followed up

Common

questions

Buried on page four Answered instantly, your words

Wrong

answers

Never found out Caught in the weekly transcript review

Exact prompts for this work

Send these as-is, swapping the [square brackets].

TRAINING DRAFT

“Here are my services, suburbs and prices-I-can-say: [paste]. Draft the twenty questions my website chat should answer, with the answers, in my voice.”

The approved-answer set is the whole product - get this right and the rest is plumbing.

BOUNDARY TEST

“List ten questions my chat should NOT answer and should hand to a human, with the polite handover phrase for each.”

Boundaries written before launch prevent the screenshots competitors share.

TRANSCRIPT REVIEW

“Here are this week's chat transcripts: [paste]. Flag wrong or weak answers and draft the corrections.”

The weekly review is what keeps 'AI chat' from becoming 'that embarrassing bot'.

The approval line

The chat answers only from material you approved, and every change to that material goes through you. Transcripts get your weekly skim.

The operating checks

Agents prepare

Answers from your approved material

Captures and logs enquiries

Flags out-of-bounds questions for humans

You approve

Every change to the approved answers

Weekly transcript corrections

Anything it was never taught

The mistakes that cost real money

Every answer traceable to your approved material

Handover rules tested before launch

Transcripts reviewed weekly, corrections made

Capture rate measured - chats to logged enquiries

It's honest that it's an AI

Letting it answer from the whole internet instead of your approved answers

Launching without boundary testing - the awkward questions find it first

Never reading transcripts, so wrong answers run for months

THE PRACTICAL SECTIONS · 6 OF 6

Hands, or plumbing.

Two ways an AI agent touches your tools: by API (direct connection to the software) or by computer access (driving a screen like a person would). Both are real, both have their place - and both need the same discipline: least access, logged actions, your approval for anything irreversible.

What you're actually setting up

API connections

The agent uses an available API for your CRM or booking system, after setup verification. Fast, reliable, logged - the preferred route when a connection exists.

Computer access

The agent drives a browser or desktop like you would - for the tools with no connection. Slower, needs supervision, sometimes the only option.

Least access, always

Read-only before read-write. One tool before many. Test account before live. Every action logged.

The approval line

Reads and drafts flow freely; anything that sends, spends, deletes or publishes waits for your tap - regardless of the route.

Set it up, step by step

1

The tool list

Every tool your business runs on, with what the agent needs from each:

read, draft, or act.

2

API first

For each tool: does a proper connection exist? Use it. Log it.

3

Computer access second

For the rest: a dedicated, supervised session - never your daily machine,

never stored passwords in plain text.

4

The gates

What always needs your yes, tool by tool: sends, spends, deletes,

publishes.

5

The audit habit

Weekly: what did the agent touch? Logs exist precisely so this question has

an answer.

By hand, or with agents

By hand With agents

Reliability Screen-driving can break when

sites change

APIs are stable contracts

Coverage Only tools with integrations Anything with a screen

Safety Broad clicks need tight

supervision

Scoped permissions,

clean logs

Exact prompts for this work

Send these as-is, swapping the [square brackets].

ACCESS AUDIT

“Here are the tools my business uses: [list]. For each, tell me whether a direct connection (API) exists, what access level an agent should get first, and what

should always need my approval.”

Least access isn't a slogan - it's a per-tool decision you make once, in writing.

GATE LIST

“Draft my approval gate list: every action type an agent might take in my business,

marked 'runs alone', 'prepares for my approval', or 'never'.”

The gates written down - the document every other chapter in this book assumes exists.

LOG REVIEW

“Summarise this week's agent action log: what was touched, what was changed,

and anything that looks outside the agreed gates.”

Ten minutes a week reading logs is the price of sleeping well.

The approval line

Access upgrades and gated actions always wait for your yes. Credentials are

entered by you through proper authorisation, never typed into a chat.

The operating checks

Agents prepare

Works inside the access you

granted

Drafts and prepares in

connected tools

Logs every action for review

You approve

Every access upgrade

Every gated action

Your credentials, entered by

you, never shared in chat

The mistakes that cost real money

Every tool's access level decided in writing

Read-only before read-write, test before live

No plain-text passwords; connections through proper auth

Weekly log review on the calendar

Sends, spends, deletes, publishes - always gated

Giving full access on day one "to save time"

Sharing passwords in chat instead of connecting through proper authorisation

Skipping the weekly log review because nothing has gone wrong yet

PUT THIS BOOK TO WORK

Want this running in your business?

Want to see AI agents working in your business? Agents like Xpress AI Coworker are hands-on and proactive - they answer calls, sort inboxes and follow up leads while you approve every action - and you can try one out.

Book a free AI audit or strategy call to see how AI agents could be used in your business:

BOOK A FREE STRATEGY CALL >

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The phone rings under a house.

Plumbers, sparkies, builders, landscapers. Your buyers call three tradies and book the first one who answers. You're usually under a house when they call. This playbook fixes that week.

A typical week, honestly

Monday to Friday, quoted jobs at 6am, on the tools by 7, phone buzzing in the pocket all day. Half the missed calls never ring back.

Evenings are quotes, invoices and the family asking why you're still on the laptop.

Weekends are either more work or more admin. The reviews you meant to ask for didn't happen again.

The maths is brutal: the jobs you did were profitable; the jobs you never heard about paid for your competitor's new ute.

Where the money leaks

Unanswered calls mid-job

Pillar 1. Every call under a house is a coin flip. A caller who reaches a voicemail calls the next name on the list.

Quotes that go out days late

Pillar 6. The quote that lands in an hour beats the better price that lands on Thursday. Speed reads as reliability.

Zero review engine

Pillar 4. Your work is excellent and your profile is empty, so you lose tenders to louder rivals.

Automate in this order

1

1. Call answering

Vera answers every call with your approved answers, books quotes, captures details. You stop losing the 11:47pm hot-water jobs.

2

2. Quote follow-up

Piper nudges every sent quote until it's a yes or a no. Prepared for your **review, sent on your approval.**

3

3. Review requests

Rita drafts a personal ask after every completed job. The profile finally **reflects the work.**

Exact prompts for trades & home services

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

AFTER-HOURS COVERAGE

“List my ten most common call types as a [your trade] in [your area], and the answer or booking action each should get from my AI receptionist.”

The approved-answer set Vera works from - written once, refined weekly.

QUOTE CHASE

“Draft a friendly two-line follow-up for a quote sent three days ago for [job type]. No pressure, one clear next step.”

Most quotes die from silence, not price. This is the cheapest recovered revenue in a trade business.

REVIEW ASK

“Draft a personal review request for [customer] after we finished [job]. One tap to the Google review page, their own words.”

Five a week, every week, and the map listing starts doing your marketing.

Your first 30 days

1

Week 1

Vera live on the phone with your approved answers. Missed-call leakage **stops this week.**

2

Week 2

Quote follow-up running: every outstanding quote gets a nudge. Watch how many come back.

3

Week 3

Review requests after every job. Baseline logged: calls answered, quotes **chased, review count.**

4

Week 4

First monthly read against the baseline. Double down on the leak that moved least.

The growth engine, applied

The growth engine for a tradie is boring and beautiful: answer everything, quote fast, collect proof. Ads come later - only after the phone is covered, because paid calls **into a voicemail are money set on fire.**

Enrolment season never sleeps.

Tutoring centres, colleges, training providers. Parents and students enquire at night, compare three providers, and enrol with whoever responds first with a real answer. This playbook builds that response.

A typical week, honestly

Enquiry spikes arrive after dinner and on weekends - exactly when the office is closed.

The same twenty questions about fees, timetables and outcomes eat hours every week.

Trial students book, then no-show, because nobody reminded them.

Term breaks should be marketing season; instead they're catch-up-on-email season.

Where the money leaks

After-hours enquiries

Pillar 1. A parent comparing providers at 9pm enrols with whoever answers at 9pm.

Fee-question friction

Pillar 2. Fee answers buried in a PDF lose families who just wanted a number.

Silent no-shows

Pillar 5. Trial classes without reminders convert at half their potential.

Automate in this order

1

1. Enquiry answering

Vera's chat answers fees, timetable and outcome questions from your **approved material, captures details, hands enrolment intent to you.**

2

2. Trial reminders

Paige confirms and reminds every trial booking. No-shows become a **measured, shrinking number.**

3

3. Re-enrolment nudges

Piper drafts end-of-term re-enrolment messages. You approve the batch **before anything sends.**

Exact prompts for education & tutoring

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

FEE ANSWERS

“Draft clear answers to our ten most-asked fee and timetable questions for [your program], in plain parent-friendly language, from these details: [paste].”

The approved-answer set your chat and receptionist both work from.

NO-SHOW FIX

“Draft a two-touch reminder sequence for a trial class booked for [day]: confirmation on booking, reminder the day before. Warm, clear, one-tap reply.”

Reminder sequences are the single highest-return automation in education.

RE-ENROLMENT

“Draft an end-of-term re-enrolment message for current families: what their child achieved, what next term covers, one clear enrolment link.”

Retention is cheaper than recruitment - this message protects next term's numbers.

Your first 30 days

1

Week 1

Approved answers drafted and loaded. Chat live on the website for fees **and timetable questions.**

2

Week 2

Trial reminders running. Baseline: enquiry response time, trial show rate.

3

Week 3

Re-enrolment batch prepared for your approval and sent.

4

Week 4

Monthly read: enquiries answered after hours, show rate, re-enrolment rate.

Adjust the weakest.

The growth engine, applied

For education the engine runs on trust: instant honest answers, reliable reminders, visible outcomes. Parents review what worked - Rita makes sure the wins get written **down.**

High stakes, slow replies.

Migration agents and professional advisers sell trust on high-stakes decisions. Enquiries are anxious, detailed and often after hours. The firm that responds first with substance wins the client.

A typical week, honestly

Enquiries are long, emotional and detailed - and sit unanswered for days while you're in appointments.

Eligibility questions repeat endlessly: the same visa subclasses, the same document lists.

Consultations get booked, then rescheduled or missed without reminders.

Follow-ups to document requests stall in your outbox, and files stall with them.

Where the money leaks

Unanswered detailed enquiries

Pillar 1. A detailed enquiry ignored for 48 hours is a client signing with the firm that replied in one.

Consultation no-shows

Pillar 5. Unreminded consultations waste your most expensive hours.

Document chase stalls

Pillar 3. Every stalled document request is a stalled matter and a frustrated client.

Automate in this order

1

1. Enquiry triage

Casey reads every enquiry, drafts the response with the right subclass information from your approved material, flags the urgent ones. You

approve every send.

2

2. Consultation rhythm

Paige confirms and reminds every appointment, captures the pre-consult **details you always ask for.**

3

3. Document chase

Piper drafts the polite, persistent document follow-ups. Nothing sends **without you.**

Exact prompts for migration & professional services

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

ENQUIRY TRIAGE

“Here are this week's new enquiries: [paste]. Sort by urgency and matter type, and draft a first response for each from my approved answers: [link]. I approve every send.”

Drafts waiting in your inbox each morning instead of anxiety waiting in theirs.

PRE-CONSULT

“Draft the pre-consultation intake questions for a [visa type] enquiry: what do I need to know before the call to make it billable-quality?”

Twenty prepared minutes replace an hour of discovery - every consult improves.

DOC CHASE

“Draft a polite third follow-up for outstanding documents on [matter]: what we still need, why it matters, one clear upload link.”

Persistent, professional, never naggy - and you approve every one.

Your first 30 days

1

Week 1

Approved answers and intake questions written. Enquiry triage drafting live.

2

Week 2

Consultation confirmations and reminders running. Baseline: response time, no-show rate.

3

Week 3

Document chase sequences drafted and sending on approval.

4

Week 4

Monthly read: enquiries answered same-day, consults held, documents received. Tighten the slowest.

The growth engine, applied

Professional services grow on responsiveness and reputation. The engine: every enquiry answered same-day, every appointment kept, every review collected. Rita **asks after successful outcomes - the best marketing a firm has.**

The intake call is the case.

Small law firms lose matters at the phone, not the courthouse.

Callers with a legal problem ring until a human answers -

evenings and weekends included. This playbook is built on a

real, sourced case study.

A typical week, honestly

Calls arrive during court, client meetings and after hours - often the moment someone decides they need a lawyer.

Reception screens what it can; everything else becomes voicemail, and voicemail becomes your competitor's client.

Weekend callers leave no message. They call the next firm on the list.

The partners know intake leaks but can't measure it: nobody counts the calls that never became files.

Where the money leaks

After-hours and weekend

calls

Pillar 1. Legal problems don't keep

office hours. A caller who reaches

voicemail rings the next firm.

Slow intake follow-up

Pillar 3. An enquiry that waits two

days for a callback has usually

signed elsewhere.

Existing clients clogging

intake

Pillar 1. Status calls tie up the

same line new matters are calling.

Automate in this order

1

1. Intake answering

Vera answers every call, runs your intake questions, captures the matter details, and routes existing clients without burning new-matter capacity.

2

2. Callback preparation

Casey drafts the callback brief for every captured enquiry: who, what, how **urgent. Your morning starts with decisions, not voicemails.**

3

3. Review collection

Rita requests reviews at matter close - the proof that wins the next caller's **trust.**

Exact prompts for law firms

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

INTAKE SCRIPT

“Draft intake questions for a [practice area] caller: what must we capture before a lawyer calls back - matter type, key dates, opposing party, urgency?”

The intake script your receptionist AI runs verbatim - consistent at 2pm and 2am.

CALLBACK BRIEF

“Here are this week's captured enquiries: [paste]. Draft a callback brief for each: matter summary, urgency, conflict-check flags.”

Partners call back prepared. Matters stop dying in voicemail.

REVIEW ASK

“Draft a review request for a client whose [matter type] just closed with a good outcome. Professional, their own words, no incentives.”

Legal services are bought on trust - and trust is bought on reviews.

Your first 30 days

1

Week 1

Intake script approved and loaded. Vera answering every call - baseline: **calls captured, after-hours share.**

2

Week 2

Callback briefs running. Existing-client calls routed away from intake.

3

Week 3

Review requests live at matter close. First trend lines on the baseline.

4

Week 4

Monthly read: calls answered, matters captured, reviews added. Compare **against the BRE Law funnel shape on the next page.**

The growth engine, applied

For law the engine is intake coverage plus proof. Answer every call, call back prepared, collect reviews at close. The case study panel shows what one firm measured over twelve weeks - figures quoted with their windows, as reported.

A real case study, with its windows

BRE Law is a Sydney law firm using an AI receptionist. These figures are as reported by the vendor, verified 29 October 2026 at aibypulse.com/bre-law-case-study - one firm's results, not a promise of yours. The two windows below are separate measurement periods - never blend them. Copy the shape: coverage first, then **measure the funnel and work the weakest step.**

Twelve weeks of coverage (7 July - 29 September 2026)

522

calls handled, plus 38 chats,

from 376

people

329

leads posted

to Clio Grow

305

leads arrived outside office

hours

93

weekend calls

covered; 75 existing-client

calls kept out

of intake

The 30-day intake funnel (24 August - 22

September 2026)

Funnel step Callers Share

Routed calls 162 100%

Spoke with the AI 137 85% of routed calls

Described their matter 107 78% of those who spoke

Contact captured 69 64% of matter descriptions

Qualified lead calls 50 36% of callers who spoke

Distinct new matters 47 94% of qualified calls

The waiting room starts at the phone.

Clinics, physios, dentists, psychologists. Patients call to book, reschedule and ask the same questions - and front desk is already checking in the waiting room. This playbook covers the phone and the follow-through, with clinical judgment strictly left to clinicians.

A typical week, honestly

The phone rings during every consultation. Patients on hold hang up and book elsewhere.

No-shows waste the scarcest resource in the practice: the appointment slot.

Recalls and care-plan reviews lapse because nobody had time to run the list.

Referral partners send patients who hit a busy line and quietly refer elsewhere next time.

Where the money leaks

Unanswered booking calls

Pillar 1. Every missed call is a booked appointment at the clinic down the road.

No-shows and late cancellations

Pillar 5. Unreminded patients cost the slot twice: the gap, and the rebooking admin.

Lapsed recalls

Pillar 5. Patients due for review who never hear from you quietly become former patients.

Automate in this order

1

1. Appointment answering

Vera books, reschedules and answers practice questions from your approved material. Clinical questions go to clinicians - always.

2

2. Reminders and recalls

Paige runs confirmations and reminders; Piper drafts recall lists for your **approval. No-shows become a measured, shrinking number.**

3

3. Feedback and reviews

Rita requests feedback after visits. Complaints route to you privately; **praise becomes reviews.**

Exact prompts for medical & allied health

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

PRACTICE ANSWERS

“Draft answers to our twenty most common patient questions - hours, parking, fees, rebates, what to bring - from these details: [paste]. Clinical questions are always handed to staff.”

The approved-answer set: admin answered instantly, clinical always escalated.

NO-SHOW FIX

“Draft our appointment reminder sequence: confirmation on booking, reminder two days out with one-tap confirm or reschedule.”

Practices measure the difference in weeks - empty slots are the most expensive thing you own.

RECALL LIST

“Here is our patient list with last-visit dates: [paste]. Draft recall messages for patients due for [review type], for my approval.”

Recalls are patient care and practice revenue in the same action.

Your first 30 days

1

Week 1

Approved answers loaded; Vera covering the phone. Baseline: calls answered, no-show rate.

2

Week 2

Reminders running on every booking.

3

Week 3

First recall batch drafted, approved, sent.

4

Week 4

Monthly read: answered calls, show rate, recalls booked. Tune the weakest **link.**

The growth engine, applied

Clinics grow on access and follow-through: every call answered, every slot defended, every due patient recalled. The engine is operational, not promotional - **and it shows in the diary within a month.**

Wheels turn, phones don't.

Freight and transport operators win work on responsiveness and reliability. Customers want quotes fast and POD answers faster - while your team is on the road or the forklift. This playbook covers the office that never sits down.

A typical week, honestly

Quote requests arrive by phone and email all day; the fastest credible quote usually wins the lane.

'Where's my freight' calls interrupt dispatch a dozen times a day with questions the tracking system already answers.

POD paperwork trails the deliveries by days, and invoicing trails the PODs.

After-hours enquiries from new customers wait until morning - if the competitor's morning came first, the lane is gone.

Where the money leaks

Slow quotes

Pillar 6. Freight buyers request three quotes and book the first credible one. Hours matter; days are fatal.

Status-call interruptions

Pillar 9. Every 'where's my freight' call is a customer you could have told first, cheaper.

Paperwork lag

Pillar 10. PODs chasing drivers, invoices chasing PODs, cash chasing invoices.

Automate in this order

1

1. Quote drafting

Casey drafts lane quotes from your rate cards the moment a request lands.

You approve the numbers; the speed is automatic.

2

2. Proactive status

Casey drafts delivery updates so customers hear it from you before they call.

Interruptions drop measurably.

3

3. Document chase

Piper follows up for PODs politely and persistently, so invoicing stops waiting on **the cab's glovebox.**

Exact prompts for trucking & transport

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

QUOTE DRAFT

“Draft a quote for [lane, freight type, frequency] from my rate card: [paste]. Plain numbers, inclusions and exclusions, valid 14 days. I approve before it sends.”

Quote speed wins lanes. The draft lands in minutes; your approval keeps the margin.

STATUS DRAFT

“Draft a proactive delivery update for [customer, job]: picked up, ETA, any delay and why. Factual and short.”

Customers forgive delays they hear about from you first. They don't forgive surprises.

POD CHASE

“Draft a third POD request for [driver, job]: one tap to upload, deadline clear, tone friendly.”

The invoice can't go out until the POD comes in - this message is cash flow.

Your first 30 days

1

Week 1

Rate cards loaded; quote drafting live. Baseline: quote turnaround, status-**call volume.**

2

Week 2

Proactive status updates running on active jobs.

3

Week 3

POD chase sequences on every delivery.

4

Week 4

Monthly read: quote turnaround, interruptions, invoice lag. Attack the **longest delay.**

The growth engine, applied

Transport grows on speed and certainty: fastest credible quote, proactive updates, paperwork that keeps pace with the wheels. Ads are pointless here - reputation and **response time are the whole engine.**

Enquiries arrive between forklifts.

3PLs and warehousing businesses sell space, accuracy and trust. Prospects enquire in bursts, ask detailed questions about capacity and rates, and choose whoever responds with specifics first.

A typical week, honestly

Capacity questions arrive by email and phone: pallet spaces, pick-pack rates, turnaround. Answers take days while the floor runs.

Current clients call for stock levels and order status - questions your WMS already knows.

Onboarding new clients is a document chase: insurances, SKUs, handling requirements.

The sales pipeline is whoever emailed last and whoever remembered to follow up.

Where the money leaks

Slow capability answers

Pillar 1. A detailed enquiry answered in a week loses to the warehouse that answered in an hour with specifics.

Status-call load

Pillar 9. Client service time burned on questions the system could answer.

Onboarding drag

Pillar 3. Weeks between signed and live, because documents trickle in.

Automate in this order

1

1. Capability responses

Casey drafts detailed responses from your approved capability sheet -

capacity, rates, turnaround, accreditations. You approve every send.

2

2. Client status updates

Casey drafts proactive inbound/outbound status summaries. Clients stop **calling for what they can read.**

3

3. Onboarding chase

Piper runs the document checklist chase until the client is live. Nothing falls **through the gap between sales and ops.**

Exact prompts for warehousing & logistics

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

CAPABILITY SHEET

“Draft our capability sheet for prospect answers: capacity, racking, pick-pack rates, turnaround times, integrations, accreditations, from these details: [paste].”

One approved sheet, and every enquiry gets the same complete answer in minutes.

PROSPECT REPLY

“Draft a response to this enquiry: [paste]. Answer from our capability sheet, ask the three qualifying questions, propose a call. For my approval.”

Specific answers plus three good questions beats a brochure every time.

ONBOARDING CHASE

“Draft the week-two onboarding follow-up for [client]: what's received, what's outstanding, the one link to send it.”

Time-to-live is a selling point for the next prospect - this protects it.

Your first 30 days

1

Week 1

Capability sheet approved. Prospect response drafting live. Baseline: response time, time-to-live.

2

Week 2

Client status summaries running for your top accounts.

3

Week 3

Onboarding chase sequences on every new client.

4

Week 4

Monthly read: response time, status-call volume, onboarding days. Tighten **the slowest.**

The growth engine, applied

Warehousing grows on responsiveness and references. Answer capability questions same-day, keep clients informed before they ask, onboard fast, then let **Rita collect the reviews that win the next contract.**

The showroom never closes.

Retailers and dealers fight for the same customer online and on the floor. Shoppers research at night, ask stock and price questions by message, and visit whoever answered. This playbook connects the after-hours researcher to the morning floor.

A typical week, honestly

Messages arrive at all hours: 'Is this in stock?', 'What's my trade-in worth?', 'Can I book a test drive?' - answered whenever someone remembers.

The floor is busy when the shop is open, so the phone and the inbox wait.

Promotions go out late and generic, because nobody has time to segment.

Reviews are asked for by the best salesperson, sometimes, when they remember.

Where the money leaks

Unanswered stock and booking messages

Pillar 1. A shopper who doesn't get an answer tonight visits the other showroom tomorrow.

Generic promotions

Pillar 7. One message to everyone moves no one. The right offer to last year's buyers does.

Invisible proof

Pillar 4. Your service wins repeat customers; your thin review profile loses new ones.

Automate in this order

1

1. After-hours answering

Vera's chat answers stock, price-range and booking questions from your approved material, captures details, books appointments for the morning.

2

2. Segmented campaigns

Sofia drafts offers for real segments - service-due customers, last-season **buyers - with measured results. You approve every send.**

3

3. Review rhythm

Rita asks every buyer. The profile grows at the rate the floor deserves.

Exact prompts for physical retail & motor

dealers

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

STOCK ANSWERS

“Draft answers to our fifteen most common stock and price questions for [your range]: what's in stock, price ranges, how to book a viewing or test drive. From: [paste].”

The approved-answer set that turns tonight's researcher into tomorrow's walk-in.

SEGMENT OFFER

“Draft a campaign for customers who bought [category] over a year ago and haven't returned: one offer, one reason to come back, one clear call to action.”

Your customer list is the cheapest ad audience you own.

REVIEW ASK

“Draft a review request for [customer] who picked up their [purchase] this week. Personal, easy, their words.”

Big-ticket buyers read reviews before they visit. Collect them like revenue.

Your first 30 days

1

Week 1

Approved answers loaded; after-hours chat live. Baseline: messages answered, bookings captured.

2

Week 2

First segment campaign drafted, approved, sent.

3

Week 3

Review requests running on every sale.

4

Week 4

Monthly read: captured bookings, campaign response, review count. Back **what moved.**

The growth engine, applied

Retail's engine is list plus proof: capture every enquirer, talk to your own customer list in segments, collect reviews on every sale. Paid ads amplify it later - they never **replace it.**

Friday night starts Wednesday.

Restaurants, cafes and food chains live on bookings, reviews and being found nearby. The phone rings hardest during service, when nobody can answer it. This playbook covers bookings, proof and local discovery.

A typical week, honestly

Service hours are when customers call to book - and when your team can least afford to answer.

Google and maps decide a third of your new customers before they ever see the menu.

Reviews arrive on their own schedule - the unhappy unprompted, the happy silent.

Quiet nights stay quiet because promoting them properly takes the time service already ate.

Where the money leaks

Unanswered booking calls

Pillar 1. A diner who can't book by phone books somewhere they can. Friday's covers are won on Wednesday night.

Stale local presence

Pillar 2. Wrong hours, old photos and an unanswered Q&A quietly steer customers to the place next door.

Unbalanced reviews

Pillar 4. Without a system, your profile can show an unrepresentative slice of your customers.

Automate in this order

1

1. Booking coverage

Vera takes bookings and answers menu, hours and parking questions from

your approved answers - during service and after close.

2

2. Profile upkeep

Marco keeps hours, photos and posts current across Google and the platforms diners actually check.

3

3. Review engine

Rita asks every happy table - QR at the till, request after bookings. The **profile starts matching the room.**

Exact prompts for restaurants & food

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

BOOKING ANSWERS

“Draft answers to our fifteen most common questions - bookings, dietary options, parking, functions - from these details: [paste].”

The approved-answer set that covers the phone while the kitchen's full.

QUIET-NIGHT FILLER

“Draft a Tuesday-night campaign for our locals: one reason to come in, one time-limited offer, ready to approve.”

Filling one quiet night a week is the cheapest growth in hospitality.

REVIEW ASK

“Draft a short review request for tonight's bookings - QR-friendly, warm, their own words.”

Volume plus recency is the whole game on maps.

Your first 30 days

1

Week 1

Approved answers loaded; booking calls covered. Baseline: bookings captured, review count, profile completeness.

2

Week 2

Profile overhaul: hours, photos, posts, Q&A.

3

Week 3

Review engine live - every table asked, every review answered.

4

Week 4

Monthly read: captured bookings, profile views, rating trend. Then the first **quiet-night campaign.**

The growth engine, applied

Hospitality's engine is discovery plus proof: be findable and current everywhere locals look, capture every booking, collect reviews on every table. Ads amplify a full **profile; they can't fix an empty one.**

Enquiries peak after midnight.

Function and event venues sell a handful of high-value bookings a month. Enquiries arrive when couples and organisers research - nights and weekends - and the venue that replies first with specifics gets the site visit.

A typical week, honestly

Enquiries are detailed: dates, capacity, packages, catering, AV. Each one deserves a real answer and gets a delayed one.

Site visits book, then reschedule or no-show without reminders.

Quotes take days to assemble, while the organiser collects three.

Past clients who loved their event never get asked to say so publicly.

Where the money leaks

Slow enquiry replies

Pillar 3. A wedding enquiry answered in three days competes with the venue that answered in an hour with the package attached.

Site-visit no-shows

Pillar 5. The highest-intent hour in your pipeline, lost to a missing reminder.

Silent happy clients

Pillar 4. Hundreds of successful events, dozens of reviews.

Automate in this order

1

1. Enquiry responses

Casey drafts complete replies from your packages sheet - dates, capacity, **inclusions, next step. You approve; the speed is automatic.**

2

2. Visit reminders

Paige confirms and reminds every site visit, captures guest counts and **dates beforehand.**

3

3. Review requests

Rita asks after every successful event - the proof that fills next season's **calendar.**

Exact prompts for event venues

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

PACKAGE ANSWERS

“Draft our enquiry answer set from these packages and details: [paste]. Dates, capacity, inclusions, ballpark pricing, viewing process.”

Complete answers win site visits. Incomplete answers win nothing.

VISIT PREP

“Draft the pre-visit confirmation for [event type, date]: what we'll show, what to bring, the three questions that make the visit productive.”

Prepared visitors convert. This message is the cheapest conversion tool you have.

REVIEW ASK

“Draft a review request for [client] whose [event] ran last weekend. Reference the moment, make it one tap.”

Venues are chosen on photos and reviews - collect both at every event.

Your first 30 days

1

Week 1

Package answer set approved; enquiry drafting live. Baseline: response **time, site visits held.**

2

Week 2

Visit reminders running; pre-visit capture live.

3

Week 3

Review requests after every event.

4

Week 4

Monthly read: response time, visits held, bookings won. Tighten the leakiest **step.**

The growth engine, applied

A venue's engine is speed plus proof: first complete answer wins the visit, the visit wins the booking, the event wins the review, the review wins the next enquiry.

Every enquiry is a listing.

Agencies run on appraisal requests and buyer enquiries - both perishable. A landlord who waits a day for a callback books the agent who rang back in an hour. This playbook covers response speed and the nurture that wins listings later.

A typical week, honestly

Buyer enquiries from the portals arrive in bursts after each listing goes live - answered in batches, days late.

Appraisal requests sit while you're at opens. The landlord calls the next agency.

Open home follow-ups are whoever the agent remembered, not everyone who came.

Past clients hear from you when you want a listing, not when you could help.

Where the money leaks

Late appraisal callbacks

Pillar 1. The first agent to call back professionally gets the lounge room. Everyone else gets voicemail.

Unworked open lists

Pillar 3. Saturday's attendees are next quarter's sellers - if anyone follows up.

Cold past-client list

Pillar 8. Your cheapest listings live in your own database, untouched.

Automate in this order

1

1. Enquiry response

Casey drafts immediate answers to portal enquiries from your approved material - and flags appraisal intent the moment it appears. You approve the

important ones.

2

2. Open follow-up

Piper drafts the same-afternoon follow-up for every attendee: thanks, the **details they asked for, one next step.**

3

3. Database nurture

Sofia drafts the monthly touch for past clients - market movement, not **begging. Approved by you before it sends.**

Exact prompts for real estate

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

APPRAISAL RESPONSE

“Draft an immediate response to a new appraisal request in [suburb]: thank them, what happens next, one question that shows local knowledge.”

Speed plus one local insight wins the lounge room visit.

OPEN FOLLOW-UP

“Draft the same-afternoon follow-up for attendees at [address]: thanks, answers to the two questions asked most today, one clear next step.”

Buyers become sellers. This is where future listings actually come from.

MONTHLY TOUCH

“Draft this month's past-client email: [suburb] market movement in three numbers, one useful insight, no hard sell.”

The agent who stays useful stays remembered. Listings follow.

Your first 30 days

1

Week 1

Approved answers loaded; enquiry response drafting live. Baseline: callback time, appraisal conversion.

2

Week 2

Open-home follow-up running on every inspection.

3

Week 3

First monthly past-client touch approved and sent.

4

Week 4

Monthly read: response times, follow-up coverage, appraisals booked.

Sharpen the weakest.

The growth engine, applied

Real estate's engine is speed plus nurture: answer everything fast, work every open

list, stay useful to your database for years. The listings compound.

Busy season all year.

Accountants and bookkeepers lose capacity to email triage, document chases and the same tax-time questions every year. This playbook protects billable hours and turns compliance deadlines into a client-care asset.

A typical week, honestly

The inbox mixes new enquiries, client documents and noise - sorted manually, morning after morning.

Document chases for outstanding records eat hours that should be billable.

Deadline reminders go out late or not at all, and clients blame you for the fine.

New enquiries in busy season wait days - and quietly become someone else's client.

Where the money leaks

Untriaged inbox

Pillar 9. New enquiries and urgent client matters die of the same cause: everything looks equal in an inbox.

Document chase drag

Pillar 3. Every stalled document stalls a job, a lodgement and an invoice.

Silent deadlines

Pillar 5. Clients who hear about the deadline from the ATO instead of you don't renew.

Automate in this order

1

1. Inbox triage

Casey sorts the inbox each morning: enquiries, documents, noise - with

drafted responses for your approval.

2

2. Document chase

Piper runs polite, persistent document sequences until the file is complete.

Nothing sends unapproved.

3

3. Deadline calendar

Paige drafts proactive deadline reminders per client - the care that keeps

clients for decades.

Exact prompts for accounting & bookkeeping

Swap the [square brackets], send as-is. Everything that reaches a customer is

approved by you first.

MORNING TRIAGE

“Sort this morning's inbox: [paste]. Enquiries first, then client documents, then noise. Draft a response for each enquiry from my approved answers: [link].”

Ten minutes of approval replaces an hour of sorting - every morning.

DOC CHASE

“Draft the third document request for [client, job]: what's outstanding, the deadline it protects, one upload link.”

Polite persistence is a service. This message protects their lodgement and your invoice.

DEADLINE REMINDER

“Draft next month's deadline reminders for my client list: [paste]. What each client owes, when, and what happens if it slips.”

Clients remember who saved them from the fine.

Your first 30 days

1

Week 1

Approved answers and triage rules set. Morning triage live. Baseline:

response time, chase hours.

2

Week 2

Document chase sequences running on every open job.

3

Week 3

Deadline calendar drafted for the quarter.

4

Week 4

Monthly read: enquiry response time, documents received on time, billable **hours recovered.**

The growth engine, applied

Accounting's engine is responsiveness plus reliability: fast answers for prospects, relentless document follow-through, deadlines clients never miss. Rita collects **reviews at every successful lodgement season.**

January churns by March.

Gyms and studios win members in January and lose them by March - to silence, not competitors. This playbook covers trial bookings, the first-90-days retention window, and the win-back list nobody works.

A typical week, honestly

Trial enquiries arrive after work, when motivation is high and the front desk is closed.

New members drift in week six when nobody notices the attendance gap.

Class bookings no-show without reminders, while the waitlist stays home.

Cancelled members never hear from you again, though half would return for one good reason.

Where the money leaks

Unanswered trial enquiries

Pillar 1. Motivation expires overnight. The gym that books the trial tonight wins the member.

Week-six drift

Pillar 5. Attendance gaps predict cancellations a month early - if anyone's watching.

Dead win-back list

Pillar 7. Past members are the warmest audience you own and the least contacted.

Automate in this order

1

1. Trial booking

Vera's approved chat and call workflows answer membership and trial questions instantly, book the visit, capture the goal. Tonight's motivation becomes tomorrow's tour.

2

2. Attendance watch

Casey flags attendance gaps weekly; Piper drafts the check-in message for **your approval.**

3

3. Win-back campaigns

Sofia drafts the quarterly win-back offer for past members. Approved, sent, **measured.**

Exact prompts for fitness & gyms

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

TRIAL ANSWERS

“Draft answers to our fifteen most common membership questions - pricing, contracts, classes, what to bring - from: [paste].”

Answered tonight, touring tomorrow, member by Friday.

DRIFT CHECK-IN

“Draft a check-in message for a member whose visits dropped from three a week to one: warm, no guilt, one reason to come this week.”

Catching drift in week six saves the cancellation in week ten.

WIN-BACK

“Draft a win-back campaign for members cancelled 3-12 months ago: what's new, one offer, one easy return path.”

They already know the location and the vibe - the cheapest acquisition in fitness.

Your first 30 days

1

Week 1

Approved answers live; trials booked around the clock. Baseline: trials **booked, show rate.**

2

Week 2

Trial reminders and first-visit follow-ups running.

3

Week 3

Attendance watch live; first drift check-ins approved and sent.

4

Week 4

Monthly read: trial-to-member rate, week-six retention, win-back responses.

The growth engine, applied

Fitness's engine is capture plus retention: book every trial the moment motivation strikes, defend the first ninety days, work the win-back list forever. Ads bring trials; **the engine keeps them.**

The chair gap costs more than rent.

Salons and clinics sell hours. Every empty chair, every no-

show, every client who quietly stopped rebooking is revenue

that walked out. This playbook fills the book and protects it.

A typical week, honestly

Booking calls and DMs arrive during appointments - answered between clients, or not at all.

No-shows and late cancels leave chair gaps that can't be refilled at zero notice.

Rebooking depends on the client's memory instead of your system.

New client reviews arrive when a stylist remembers to ask - so mostly for the one who does.

Where the money leaks

Unanswered booking

messages

Pillar 1. A client who can't book at

9pm books the salon that

answered at 9pm.

Chair gaps

Pillar 5. No-shows and late

cancels are the purest waste in

the business - paid rent, empty

chair.

Lapsed clients

Pillar 7. Clients don't leave; they

drift. Nobody notices until the

book has holes.

Automate in this order

1

1. Booking coverage

Vera's approved chat and call workflows book, reschedule and answer service questions from

your approved material - while your hands are full.

2

2. Reminder rhythm

Paige confirms every appointment with one-tap reschedule, so gaps get **refilled from the waitlist.**

3

3. Rebooking nudges

Piper drafts the 'you're due' message at each client's natural interval. **Approved by you, sent on schedule.**

Exact prompts for beauty & salons

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

SERVICE ANSWERS

“Draft answers to our fifteen most common questions - services, pricing from, duration, aftercare - from: [paste].”

The approved-answer set that fills the book while you're mid-foil.

GAP FILLER

“Draft a same-day gap post for tomorrow's cancellations: the slots, the services, the booking link.”

A gap posted at 7am is a chair filled by 10am.

DUE NUDGE

“Draft rebooking nudges for clients due this week: their service, their stylist, one tap to book.”

Rebooking by system instead of memory is the whole retention game.

Your first 30 days

1

Week 1

Approved answers live; bookings covered after hours. Baseline: bookings **captured, no-show rate.**

2

Week 2

Reminders with one-tap reschedule running.

3

Week 3

Rebooking nudges live on natural intervals; first gap-filler posts.

4

Week 4

Monthly read: chair utilisation, no-shows, rebooking rate. The book tells the **truth.**

The growth engine, applied

Salon's engine is a full book: capture every enquiry, defend every slot with reminders and waitlists, nudge every client at their interval. Rita collects the reviews that keep **new clients coming.**

Trust is the product.

Workshops fight the industry's trust deficit: customers arrive braced to be ripped off. The workshops that win answer fast, explain plainly, and prove it in reviews. This playbook builds exactly that.

A typical week, honestly

Booking calls interrupt jobs all day - the phone rings with your hands in an engine bay.

Quotes go out when someone gets to them; the customer has already rung two other workshops.

Approvals for extra work stall while the customer's at work and can't take calls.

Reviews skew to the one angry customer in fifty, because the happy forty-nine were never asked.

Where the money leaks

Missed booking calls

Pillar 1. A customer with a warning light calls until a human answers. Voicemail is a donation to the next workshop.

Slow quotes and approvals

Pillars 6 and 3. Slow quotes delay decisions; extra-work approvals can also stall work. Track turnaround and follow-up separately.

Skewed review profile

Pillar 4. Without a system, your public reputation is written by your worst day.

Automate in this order

1

1. Booking coverage

Vera books services and answers hours, pricing-from and loan-car questions from your approved answers.

2

2. Approval messages

Piper drafts the extra-work approval text: photo, plain-English explanation, **exact cost, one-tap yes or no. Sent with your tap.**

3

3. Review engine

Rita asks at pickup - when the car works and the bill made sense. The profile **starts telling the truth.**

Exact prompts for automotive repair

Swap the [square brackets], send as-is. Everything that reaches a customer is **approved by you first.**

SERVICE ANSWERS

“Draft answers to our fifteen most common questions - service pricing from, turnaround, loan cars, warranty - from: [paste].”

Plain answers to anxious questions is what trust looks like before the first visit.

APPROVAL TEXT

“Draft an approval message for extra work on [vehicle]: what we found, the photo, why it matters, the exact cost, one-tap approve or decline.”

Approvals in minutes instead of phone tag - and a written record for everyone.

REVIEW ASK

“Draft a review request for [customer] picking up their [vehicle] today: reference the job, one tap, their words.”

In a low-trust industry, volume of honest reviews is the moat.

Your first 30 days

1

Week 1

Approved answers live; booking calls covered. Baseline: bookings captured, approval lag.

2

Week 2

Approval texts running on every extra-work find.

3

Week 3

Review requests at every pickup.

4

Week 4

Monthly read: bookings captured, approval turnaround, rating trend. Trust, **measured.**

The growth engine, applied

A workshop's engine is speed plus proof: answer every call, approve every job in minutes, collect a review at every pickup. The reputation compounds into the only **marketing that matters here.**

THE PROMPT LIBRARY

PUT THIS BOOK TO WORK

Want this running in your business?

Want to see AI agents working in your business? Agents like Xpress AI Coworker are hands-on and proactive - they answer calls, sort inboxes and follow up leads while you approve every action - and you can try one out.

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Every prompt, ready to send.

This is the complete Xpress AI co-worker prompt library - 96 prompts across 17 categories, reproduced verbatim from xpressaicoworker.com/prompt-library/ (verified 29 October 2026). Swap the [square brackets] for your details and send.

How to read the labels

Connection tags

"No connection needed" works in a plain chat. Anything naming Gmail, Calendar, your website or email needs that connection set up first - the platform walks you through it, and you authorise it.

Approval is always yours

Prompts that draft something to send, post, book or spend prepare the work for your review. Nothing reaches a customer, a platform or your card without your explicit go-ahead.

"You get back"

The expected output, so you know what a good response looks like before you send the prompt.

Start here

If you use one category first, use "Set up and account" - every other prompt gets sharper once your business profile is saved.

Examples are illustrative source responses, not verified executions or customer results. Capability claims remain the source's claims. This public library has 96 prompts across 17 categories. The 48 authored workflow briefs in the next section are separate, not vendor commands or verbatim public-library content.

Set up and account

7 PROMPTS

Tell Xpress About Your Business

ADMIN NO CONNECTION NEEDED

Saves your business profile so every post, email, quote and research run is tailored to your services and areas.

“Here's my business: [business name], [what you do], based in [suburb or city]. Our main services are [service 1], [service 2] and [service 3]. Our best customers are [who they are] in [areas you cover]. Our website is [website address].”

You get back: Confirmation that your details are saved, read back to you so you can fix anything.

Save Your Brand Voice

MARKETING NO CONNECTION NEEDED

Stores your brand style and uses it for every post, image and email from then on.

“Our brand colours are [colour 1] and [colour 2]. Our tone is [for example: friendly and no-nonsense]. Always sign off with '[your sign-off]'.”

You get back: Confirmation that your brand style is saved.

Save Your Logo

MARKETING NO CONNECTION NEEDED

Checks the image is a logo, saves it and adds it to your designs from then on.

“(Send your logo as a photo) This is our logo”

You get back: Confirmation that the logo is saved for future images.

See What's Switched On

ADMIN NO CONNECTION NEEDED

Lists the features switched on for your account, each with a short code to start it.

“menu”

You get back: Your feature menu with start codes.

Get Your Connections Link

ADMIN NO CONNECTION NEEDED

Sends a private link to your Connections page, where you connect Gmail, Outlook, Google Calendar and other apps.

“connections link”

You get back: A private link, valid for 7 days.

Pause or Resume

ADMIN NO CONNECTION NEEDED

Asks whether to pause routines, connections or everything, and for how long. Reply RESUME to switch back on.

“PAUSE”

You get back: A pause confirmation. You can still chat with me while paused.

Plan and Billing Status

ADMIN NO CONNECTION NEEDED

Shows your plan and billing status.

“STATUS”

You get back: Your current plan and billing status.

Daily routines

8 PROMPTS

Morning Brief

ADMIN SET UP WITH YOU

Combines today's calendar (with clashes flagged) and your inbox triage into one morning message.

“Every weekday at [7am], send me a summary of my day and anything urgent in my inbox.”

You get back: We set it up with you, then a brief each morning.

Daily SEO Check

MARKETING NEEDS: WEBSITE ADDRESS ON FILE

Searches Google for that keyword the way a local customer would and checks whether your business appears.

“Run my daily SEO check: where do I show up on Google for [main service] [suburb]?”

You get back: Your position (when your website is on file) and the top five results for that search.

Daily AEO Check

MARKETING NO CONNECTION NEEDED

Asks AI assistants three real customer questions about your service and area and checks whether you're named.

“Run my daily AEO check: do AI assistants like ChatGPT recommend my business for [main service] in [suburb]?”

You get back: How many of the answers mentioned you, plus the fixes that matter most if you're missing.

Weekly Google Business Profile Post

MARKETING NO CONNECTION NEEDED

Writes a short Google Business Profile update in your brand voice.

“Write this week's Google Business Profile post about [service or recent job] in [suburb], with a clear call to action.”

You get back: A GBP post draft for you to check and post.

Weekly Review Round-Up

CUSTOMER SERVICE NO CONNECTION NEEDED

Writes a short, personal review request for each customer with your Google review link.

“Write review requests for the customers we finished jobs for this week: [first name and job for each customer].”

You get back: One ready-to-send message per customer.

Daily Competitor Scout

MARKETING NO CONNECTION NEEDED

Checks who's competing with you: the websites up against you on Google when your website is on file, otherwise real local businesses found on the web and what they've posted or offered lately.

“Run today's competitor scout.”

You get back: A short competitor rundown with sources or shared-keyword counts.

Today's Social Post

MARKETING NO CONNECTION NEEDED

Writes one ready-to-post caption in your brand voice with a hook and a few hashtags.

“Write today's social post about [topic, job or offer] for Facebook and Instagram.”

You get back: A post draft for you to approve. Nothing goes out until you say so.

Check What's Running

ADMIN NO CONNECTION NEEDED

Lists what's scheduled for you and anything that's paused.

“What routines do I have?”

You get back: Your routines today and their status.

Find competitors

5 PROMPTS

Find My Competitors

MARKETING NO CONNECTION NEEDED

Finds who you're up against: the websites competing with you on Google when your website is on file, otherwise real local businesses found on the web, LinkedIn included.

“Research my competitors online first, then tell me who my top competitors are for [main service] in [suburb or region].”

You get back: A short list of competitors with sources or shared-keyword counts. Ask about any one of them to go deeper.

Who I'm Up Against on Google

MARKETING NEEDS: WEBSITE ADDRESS ON FILE

Pulls the websites that compete with yours in Google search in Australia.

“Who are my main competitors on Google?”

You get back: Competing websites with how many keywords each shares with you.

What Competitors Are Posting

MARKETING NO CONNECTION NEEDED

Searches LinkedIn, X and the web for real public posts on that topic.

“Find recent posts from other [your industry] businesses in [city] about [topic].”

You get back: Up to six posts, each with who posted, the gist and a link.

Write a Post That Beats a Competitor's

MARKETING NO CONNECTION NEEDED

Writes an original post on the same theme that leans on your strengths, never copying theirs.

“Here's a post a competitor put up: [paste their post]. Write a better post on the same topic for my business, in my voice, without naming them.”

You get back: A post draft for you to check, with a stronger hook and a clear call to action.

How Do My Prices Compare

SALES NO CONNECTION NEEDED

Web research with sources on typical prices and how others word them.

“Research what [service] typically costs in [city] right now and how businesses like mine present their pricing.”

You get back: A short summary with price ranges found and source links.

Research topics

5 PROMPTS

Research a Topic with Sources

SALES NO CONNECTION NEEDED

Searches the web and sums up what matters, with links.

“Research [topic] and give me the key points I need to know as a [your industry] business owner, with sources.”

You get back: A short brief with sources.

Compare Products or Suppliers

SALES NO CONNECTION NEEDED

Side-by-side research so you can recommend one with confidence.

“Compare the best [product type] for [use, for example a family of four] in [city], with sources.”

You get back: A comparison with pros, cons and source links.

Prep Me for a Meeting

ADMIN NEEDS: GOOGLE CALENDAR

Researches who they are and checks your calendar for the meeting, then writes a short brief.

“Prep me for my meeting with [company name].”

You get back: Who they are, what they do and what to cover.

Summarise a Document

ADMIN NO CONNECTION NEEDED

Reads the document and pulls out the key points and actions.

“(Send the PDF or a photo) Give me a three-line summary of this and anything I need to act on.”

You get back: A short summary and an action list.

Find What Customers Ask About

MARKETING NO CONNECTION NEEDED

Pulls keyword ideas with monthly search numbers so you know what to write about.

“What are people searching for about [service] in [city]? Give me keyword ideas.”

You get back: Keyword ideas with search interest.

Viral content

5 PROMPTS

Find Trending Posts in My Industry

MARKETING NO CONNECTION NEEDED

Searches LinkedIn, X and the web for recent posts on that topic that people are talking about.

“Find trending posts on LinkedIn and X about [topic] in the [your industry] industry.”

You get back: Up to six real posts, each with who posted, the gist and a link.

Turn a Popular Post into My Own

MARKETING NO CONNECTION NEEDED

Rewrites the idea from your point of view, with a new hook, never a copy.

“This post is doing well: [paste the post]. Write my own version for my business with a fresh angle and a strong first line.”

You get back: A post draft plus two alternative opening lines.

Write Five Scroll-Stopping Hooks

MARKETING NO CONNECTION NEEDED

Writes short hooks built to make people stop and read.

“Write five scroll-stopping opening lines for a post about [topic] for [your type of customer].”

You get back: Five hooks to choose from.

A Month of Post Ideas

MARKETING NO CONNECTION NEEDED

Plans a month of post topics, each with a hook.

“Give me 12 post ideas for [month] for a [your industry] business in [area], based on what's topical right now.”

You get back: Twelve ideas. Pick the ones you like and I'll write them up.

Turn Job Clips into a Reel

MARKETING NO CONNECTION NEEDED

Stitches your clips into one short reel.

“(Send three or four short video clips from the job) make a reel”

You get back: A reel for you to check before anything is shared.

LinkedIn posts

6 PROMPTS

Write a LinkedIn Post for My Business

MARKETING NO CONNECTION NEEDED

Writes a LinkedIn post using your saved business profile and brand voice.

“Write a LinkedIn post for my business about [topic, win or lesson], in my voice, ending with a question to get comments.”

You get back: A post draft for you to copy and post.

Job Win Post

MARKETING NO CONNECTION NEEDED

Turns a finished job into a short story post that shows your skill.

“Write a LinkedIn post about a job we just finished: [type of job] in [suburb]. The challenge was [challenge] and we solved it by [what you did]. Don't name the client.”

You get back: A LinkedIn post draft.

Expert Tip Post

MARKETING NO CONNECTION NEEDED

Writes a tips post that positions you as the expert.

“Write a LinkedIn post sharing my top [3] tips on [topic] for [your type of customer].”

You get back: A LinkedIn post draft.

Hiring Post

SALES NO CONNECTION NEEDED

Writes a recruitment post to go with your job ad.

“Write a LinkedIn post saying we're hiring a [role] in [area], what makes us a good place to work, and how to apply.”

You get back: A LinkedIn post draft.

A Week of LinkedIn Posts

MARKETING NO CONNECTION NEEDED

Plans and writes a week of varied posts.

“Write five LinkedIn posts for next week for my business: one tip, one job story, one behind the scenes, one customer question answered and one about our team.”

You get back: Five post drafts, labelled by day.

Turn a Blog into a LinkedIn Post

MARKETING NO CONNECTION NEEDED

Shortens long content into a post with a strong first line.

“Turn this article into a short LinkedIn post: [paste the article or main points].”

You get back: A LinkedIn post draft.

Comment on posts

4 PROMPTS

Comment on LinkedIn Posts

MARKETING NO CONNECTION NEEDED

Writes a genuine comment for each post that adds value rather than selling.

“Write a thoughtful comment for each of these LinkedIn posts, in my voice, adding something useful from my experience: [paste each post].”

You get back: One comment per post, for you to copy and post.

Find Posts Worth Commenting On

MARKETING NO CONNECTION NEEDED

Searches for recent public posts on that topic.

“Find recent LinkedIn posts about [topic] from people in [your industry or your customers' industry] that I could comment on.”

You get back: Up to six posts with who posted, the gist and a link.

Comment on a Potential Client's Post

SALES NO CONNECTION NEEDED

Writes a warm comment that starts a relationship.

“Write a short, genuine comment on this post by a [their role] at a [their type of business]. I'd like them to notice us without it sounding like a sales pitch: [paste the post].”

You get back: Two comment options to choose from.

Reply to Comments on My Post

CUSTOMER SERVICE NO CONNECTION NEEDED

Writes a reply to each comment to keep the conversation going.

“Here are the comments on my post: [paste the comments]. Write a friendly reply to each one.”

You get back: One reply per comment.

Share in groups

4 PROMPTS

Share a Post in Groups

MARKETING NO CONNECTION NEEDED

Rewrites your post as helpful group content with a soft mention of your business.

“Rewrite this post so I can share it in local Facebook and LinkedIn groups without it sounding like an ad: [paste the post].”

You get back: A group-friendly version for you to share.

Find Groups to Share In

MARKETING NO CONNECTION NEEDED

Web research for public groups related to your customers and area.

“Research popular Facebook groups and online community groups where [your type of customer] in [area] talk about [topic].”

You get back: A list of groups found, with links where available.

Helpful Answer for a Group Question

MARKETING NO CONNECTION NEEDED

Writes a genuinely useful answer that builds trust.

“Someone in a local group asked: '[paste the question]'. Write a helpful answer from me as a local [your trade] that doesn't push for work.”

You get back: A reply for you to post.

Group Post with an Offer

MARKETING NO CONNECTION NEEDED

Writes a group-friendly offer post.

“Write a short group post for [group type, for example local community groups] about [offer], following typical group rules: helpful first, offer second.”

You get back: A post draft for you to share.

Social posts and images

4 PROMPTS

Branded Post Image

MARKETING NO CONNECTION NEEDED

Designs an image with your logo and brand colours, a bold headline and a call to action, plus a caption.

“Make a branded post image for [offer or message], [price or detail if any], valid until [date].”

You get back: An image and caption for you to approve.

Make a Flyer

MARKETING NO CONNECTION NEEDED

Designs a printable flyer in your brand style.

“Create a flyer for letterbox drops in [suburb]: [service], [price if any], call [your phone number].”

You get back: A flyer image you can print or share.

Post from a Job Photo

MARKETING NO CONNECTION NEEDED

Looks at the photo and writes a caption to go with it.

“(Send a photo from the job) Write a post about this job for Facebook and Instagram.”

You get back: A post draft with the photo, for you to approve.

Google Business Profile Offer Post

MARKETING NO CONNECTION NEEDED

Writes a GBP offer post with a clear call to action.

“Write a Google Business Profile post for our [offer] in [area], valid until [date].”

You get back: A GBP post draft.

SEO and AEO

10 PROMPTS

Keywords I Rank For

MARKETING NEEDS: WEBSITE ADDRESS ON FILE

Pulls the Google keywords your website ranks for in Australia, with positions.

“What keywords do I rank for on Google?”

You get back: A list of keywords with your position and monthly searches, plus a spreadsheet.

Do AI Assistants Recommend Me

MARKETING NO CONNECTION NEEDED

Asks AI assistants real customer questions and checks whether you're named.

“Does ChatGPT recommend my business for [service] in [suburb]?”

You get back: How many answers mentioned you, plus the fixes that matter most.

Blog Post That Answers a Real Question

MARKETING NO CONNECTION NEEDED

Writes a helpful blog draft built around the question customers search for.

“Write a blog post answering: [a question customers ask you, for example how much does a switchboard upgrade cost in Sydney].”

You get back: A blog draft for your OK before anything goes up.

Website FAQs

MARKETING NO CONNECTION NEEDED

Writes clear question and answer pairs, the format Google and AI assistants read best.

“Write [8] FAQs for our website based on the questions customers ask us about [service].”

You get back: FAQ pairs ready for your website.

Service Page Rewrite

MARKETING NO CONNECTION NEEDED

Rewrites the page in plain words with your services and areas up front.

“Rewrite our [service] page so it clearly says what we do, where we work and why to choose us: [paste the current page text].”

You get back: New page copy for you to check.

Fix a Directory Listing

MARKETING NO CONNECTION NEEDED

Takes the change on and gives you a reference. Some listing changes are done by our team behind the scenes.

“Update our [detail, for example opening hours] on [directory name] to [new detail].”

You get back: A reference now and a message when it's done.

AEO Report

MARKETING NO CONNECTION NEEDED

Checks how AI assistants and Google see your business, then lists what's working, what's missing and what to fix first.

“Run an AEO report on [business name] in [suburb or city]. Tell me what's good and what's missing on my website and Google Business Profile for AI answers.”

You get back: A plain-English AEO report: what's working, what's missing and the top fixes, in order.

SEO Report

MARKETING NEEDS: WEBSITE ADDRESS ON FILE

Looks at the Google keywords you rank for, the sites competing with you and your key pages, then lists the fixes that matter most.

“Run an SEO report on my website for [main service] in [suburb or city].”

You get back: An SEO report: keywords you rank for, who's ahead of you and the top fixes, in order.

Citations Check

MARKETING NO CONNECTION NEEDED

Checks the main directories and listings for your business name, address and phone number, and flags anything wrong or missing.

“Check my business listings for [business name]. Are my name, address and phone number the same everywhere online?”

You get back: A list of listings that match, ones with wrong details and ones that are missing.

Website and Google Business Profile Issues Report

MARKETING NO CONNECTION NEEDED

Reviews your website, Google Business Profile and public profiles and lists every issue, from missing details to broken links, with the fix for each.

“Give me a detailed report of the issues on my website [website address], my Google Business Profile and my other online profiles like Facebook and Instagram.”

You get back: A detailed issues report, grouped by platform, with the fix for each issue and the most important ones first.

Reviews and reputation

6 PROMPTS

Start Getting More Reviews

MARKETING NO CONNECTION NEEDED

Finds your Google review link, checks it with you, then writes review requests for your recent customers.

“Help me get more Google reviews.”

You get back: Your review link confirmed and request messages ready to send.

Review Request for One Customer

CUSTOMER SERVICE NO CONNECTION NEEDED

Writes a short, personal review request with your review link.

“Write a review request for [customer first name], we finished their [job] in [suburb] on [day].”

You get back: A ready-to-send message.

Reply to a Good Review

CUSTOMER SERVICE NO CONNECTION NEEDED

Writes a warm, specific reply that mentions the job and your area.

“Write a reply to this Google review from [first name]: '[paste the review]'.”

You get back: A reply to post on the review.

Reply to a Bad Review

CUSTOMER SERVICE NO CONNECTION NEEDED

Writes a calm, professional reply that acknowledges the issue and offers to make it right.

“Help me reply to this [2]-star review without making it worse: '[paste the review]'.”

You get back: A reply to post on the review.

Google Review Audit with Reply Drafts

MARKETING NO CONNECTION NEEDED

Goes through your Google reviews and lists the ones with no reply yet, negative and positive, then drafts a natural reply for each that mentions the job, your service and your area.

“Audit the Google reviews on my Business Profile for [business name] in [suburb or city]. Show me which reviews haven't been replied to, good and bad, and draft a reply for each.”

You get back: A list of unreplied reviews, the negative ones first, each with a reply draft for you to check and post.

Where Else to Get Reviews

MARKETING NO CONNECTION NEEDED

Researches the review sites and directories people in Australia check for your kind of business, such as Facebook, ProductReview, True Local, hipages, ServiceSeeking, Oneflare, Yelp or Trustpilot, and picks the ones that matter for you.

“Where else should [business name] get reviews, besides Google? We're a [type of business] in [suburb or city].”

You get back: A short list of the review sites worth your time, why each one, and a review request you can send to every happy customer.

Invoices and quotes

7 PROMPTS

Draft a Quote

FINANCE NO CONNECTION NEEDED

Drafts a quote with line items, GST and deposit terms. If a price is missing it asks once.

“Quote for [customer name]: [job description] at [job address], $[price] plus GST, [deposit terms].”

You get back: A quote draft to check and send.

Quote with Price to Be Confirmed

FINANCE NO CONNECTION NEEDED

Writes up the scope with the price marked to be confirmed.

“Make a quote for [customer name] to [job description] in [suburb], price to be confirmed.”

You get back: A quote draft with the scope written up.

Draft an Invoice

FINANCE NO CONNECTION NEEDED

Drafts an invoice with GST worked out.

“Create an invoice for [customer or company] for [job] at [address], $[amount] including GST, due in [14] days.”

You get back: An invoice draft to check and send.

Find My Invoices in My Inbox

FINANCE NEEDS: GMAIL

Searches your Gmail from the last 30 days for emails mentioning invoices.

“Find emails about invoices”

You get back: Up to eight matching emails with who sent them, when and a preview.

Chase an Overdue Invoice

FINANCE NEEDS: EMAIL (GMAIL OR OUTLOOK)

Writes a polite payment reminder and saves it to your mailbox drafts. Nothing is sent.

“Write an email to [customer name] chasing invoice [number] for $[amount], which was due [date]. Friendly but firm.”

You get back: An email draft in your Gmail or Outlook drafts.

Follow Up a Quote

SALES NEEDS: EMAIL (GMAIL OR OUTLOOK)

Writes a short follow-up and saves it to your drafts.

“Draft an email to [customer name] following up the [job] quote I sent on [day].”

You get back: An email draft in your drafts.

Voice Note to Quote

FINANCE NO CONNECTION NEEDED

Transcribes your voice note and acts on it, for example a quote draft plus a reminder.

“(Send a voice note describing the job, the customer, the price and anything to remember)”

You get back: The quote draft and any reminders you asked for.

Bookkeeping

4 PROMPTS

Receipts to a List

FINANCE NO CONNECTION NEEDED

Reads each receipt photo and lists the details.

“(Send photos of your receipts in one go) Read these receipts and list the supplier, date, amount and GST for each.”

You get back: A tidy list ready to copy into your books.

Month-End Accountant Pack

FINANCE NO CONNECTION NEEDED

Totals the receipts you sent into a summary and writes a cover email.

“Make my accountant pack for [month] from the receipts I just sent, and draft an email to my bookkeeper.”

You get back: A summary plus an email draft for you to check and send.

Monthly Bookkeeping Reminder

FINANCE NO CONNECTION NEEDED

Sets a reminder and messages you when it's due.

“Remind me on the last Friday of every month at [4pm] to send my receipts to my bookkeeper.”

You get back: A confirmed reminder.

Find Supplier Bills

FINANCE NEEDS: GMAIL

Searches your Gmail from the last 30 days for that supplier.

“Find emails from [supplier name]”

You get back: Matching emails with dates and a preview.

Email

5 PROMPTS

Check My Email

ADMIN NEEDS: GMAIL

Sorts your recent inbox into urgent, reply this week, FYI and noise, and drafts replies to the top three.

“check my email”

You get back: Your inbox sorted, with reply drafts saved to Gmail Drafts.

Find an Email

ADMIN NEEDS: GMAIL

Searches your Gmail from the last 30 days. Keep it to a word or two for the best matches.

“Find emails about [topic, person or company]”

You get back: Matching emails with who sent them, when and a preview.

Draft an Email

ADMIN NEEDS: EMAIL (GMAIL OR OUTLOOK)

Writes the email in your voice and saves it to your drafts. Nothing is sent.

“Write an email to [who] asking [what you need] by [when].”

You get back: An email draft in your Gmail or Outlook drafts.

Reply to a Customer Email

CUSTOMER SERVICE NEEDS: EMAIL (GMAIL OR OUTLOOK)

Writes a friendly reply and saves it to your drafts.

“Draft a reply to this customer: '[paste their message]'. We can [what you can offer, for example come Thursday morning].”

You get back: A reply draft.

Intro Email to a Referral Partner

SALES NEEDS: EMAIL (GMAIL OR OUTLOOK)

Writes a short intro email and saves it to your drafts.

“Write a short intro email to [contact role] at [type of business, for example strata management] offering our [service].”

You get back: An email draft to check and send.

Calendar and conflicts

6 PROMPTS

Connect My Calendar

SCHEDULING NO CONNECTION NEEDED

Sends a secure link to connect Google Calendar so I can read your bookings.

“connect my calendar”

You get back: A link to connect. Once done, I can read your calendar on request.

Tell Me All My Conflicts

SCHEDULING NEEDS: GOOGLE CALENDAR

Checks your calendar for overlapping bookings.

“Any clashes on my calendar [this week or next week]?”

You get back: Each clash with times, so you can fix it early.

What's on Today

SCHEDULING NEEDS: GOOGLE CALENDAR

Lists today's bookings in order and flags anything that overlaps.

“What's on today?”

You get back: Today's calendar in order.

Prep All of Today's Meetings

SCHEDULING NEEDS: GOOGLE CALENDAR

Writes a short brief for each meeting on today's calendar.

“prep my meetings today”

You get back: A brief per meeting.

Summarise a Meeting

ADMIN NO CONNECTION NEEDED

Turns your notes into decisions, action items and who's doing what.

“meeting notes: [paste your notes or transcript]”

You get back: A meeting summary with actions.

One-Off Reminder

SCHEDULING NO CONNECTION NEEDED

Sets a reminder and messages you when it's due.

“Remind me at [time] [day] to [task].”

You get back: A confirmed reminder.

Customer follow-up

4 PROMPTS

After-Job Check-In

CUSTOMER SERVICE NO CONNECTION NEEDED

Writes a friendly after-job message that opens the door to a review or repeat work.

“Write a short check-in message for [customer first name], we finished their [job] [how long ago]. Ask if everything's working and if they need anything else.”

You get back: A message ready to send by text or email.

Win Back a Past Customer

SALES NO CONNECTION NEEDED

Writes a helpful reminder that brings repeat work.

“Write a message to a past customer we did [job] for about [time] ago, reminding them it's time for [service, for example a yearly service].”

You get back: A message ready to send.

Handle a Complaint

CUSTOMER SERVICE NO CONNECTION NEEDED

Writes a calm reply that owns the problem and offers a fix.

“Help me reply to this complaint without getting defensive: '[paste the complaint]'.”

You get back: A reply ready to send.

Remind Me to Follow Up

SCHEDULING NO CONNECTION NEEDED

Sets a follow-up reminder.

“Remind me in [3 days] to follow up [customer first name] about the [job] quote.”

You get back: A confirmed reminder.

Leads and prospecting

6 PROMPTS

Local Lead List

SALES NO CONNECTION NEEDED

Pulls best-fit businesses from public Google Maps listings into a spreadsheet.

“Find [type of business, for example builders] in [suburb or region].”

You get back: A short list plus a spreadsheet with phones, websites and ratings. Nobody is contacted.

LinkedIn Decision Makers

SALES NO CONNECTION NEEDED

Finds public LinkedIn profiles from search results. I never log in to LinkedIn.

“Find [job title] at [type of business] in [area] on LinkedIn.”

You get back: A short list plus a spreadsheet. Nobody is contacted.

Write Outreach for a Lead

SALES NO CONNECTION NEEDED

Writes a short, personal outreach message.

“Write a short intro message to the owner of [business name] offering our [service] for [their type of work].”

You get back: A message for you to check and send yourself.

LinkedIn Connection Note

SALES NO CONNECTION NEEDED

Writes a short, friendly note that doesn't sell.

“Write a short LinkedIn connection request note to a [job title] at a [type of business], mentioning [something you have in common or a reason to connect].”

You get back: Two note options.

Write a Job Ad

SALES NO CONNECTION NEEDED

Asks six quick questions one at a time, then writes a ready-to-post job ad.

“I need to hire a [role], [full-time or part-time], based in [suburb].”

You get back: A job ad draft.

Find Leads in My CRM

SALES SET UP WITH YOU

Reads your CRM contacts, notes and past jobs, picks out the people most likely to buy again with a reason for each, and drafts a message for each one.

“Look through my CRM and find past customers and leads worth contacting again, based on their notes and history.”

You get back: A short list of people to contact, why each one, and drafts for you to check. Nothing is sent.

Where to go from here

The library is a menu, not a checklist

Nobody uses a 204-entry library cover to cover. Owners who get value pick the three or four that attack their biggest leak - usually the missed-call prompt, one review **prompt, and one content prompt - and use them every week until the** numbers move. If you haven't found your biggest leak yet, go back to Part 1 and run the audit. If you've found it, your playbook in Part 4 shows the order **to work in.**

Keep the labels honest

A prompt that needs Gmail does nothing until Gmail is connected. A prompt that drafts a customer message changes nothing until you approve it. The **tools are patient - the discipline is the product.**

PRACTICAL CAMPAIGNS AND BUILD WORKFLOWS

48 original authored supplements | Prompts 97-144 | Publication draft, 29 October 2026

From idea to a working campaign

Use the same seven-stage path every time

1. Brief: name the objective, owner, audience, real offer, dates/timezone, capacity, budget ceiling and approved claims. 2. Check the feature: confirm what this account and plan can actually do. 3. Prepare: draft copy, designs, forms and workflow specifications. 4. Build: an authorised administrator connects the pieces in a test environment. 5. Test: normal, missing-data, duplicate, opted-out, sold-out and failed-delivery cases. 6. Approve: a person signs off the audience, assets, terms and dispatch. 7. Measure: reconcile registrations, attendance, enquiries, sales, costs, refunds and opt-outs. Stop if a wrong audience or broken suppression rule appears.

Three lanes, not one magic command

Drafting lane: Xpress AI product materials describe writing, planning and certain connected jobs, subject to setup and approval. Configuration lane: forms, CRM rules, QR registrations, testimonial collectors and event automations are proposed workflows. Generic platform documentation does not prove they are offered or enabled in Xpress AI; ask the provider to confirm the feature, plan, account and limits before building. External lane: app/code generation, deployment and automated testimonial-video editing are not documented Xpress AI capabilities. Use the build briefs with a suitable external assistant, developer or editor. Never treat a prompt as proof of execution.

One campaign record

Keep a versioned brief, source-fact sheet, asset register, audience/suppression specification, consent evidence, test results, approval record and closeout sheet together. Use a campaign ID such as DEMO-LAUNCH-01 in fictional exercises. Do not paste customer exports or private footage into an unapproved assistant. A generated file or successful-looking screen is not proof that the right record or person received the right thing.

What these pages add

The source library retains 96 vendor prompts across 17 categories. This section adds 48 authored workflow briefs, numbered 97-144, for 144 entries in this earlier inventory; a further 60 follow later, giving 204 numbered entries in the book. The new entries are not vendor commands, verified outputs or a claim that one product can execute all 144. Some extend familiar subjects into a larger job with different inputs, deliverables and controls. Every fictional example is invented for learning. None is a measured client result.

Build websites, apps and code without false promises

A five-page website, from brief to release

Use prompt 97 for a local prototype, not a live-site promise. Supply accurate business details and licensed assets. Start with a sitemap and a fact sheet; mark missing prices, qualifications and testimonials rather than guessing. Build Home, Services, About, FAQs and Contact with a demo-only enquiry form. Review copy before visual polish. Test phone layouts, keyboard navigation, links, contrast, labels, required fields and errors. Then have a developer connect secure form handling, spam protection, analytics and approved consent wording. Keep production credentials outside the code.

An internal app is an access-control project

Prompt 99 turns a job-tracking idea into a small synthetic-data prototype. Define roles before screens: who may view, create, assign, export and delete a job? Test one user trying to read another user's record, expired sessions, invalid input, duplicate saves and failed writes. A dashboard with attractive fake rows is not a working business system. Have qualified technical review before importing real records or releasing any app.

Code fixes and integrations

For prompt 100, provide the failing behaviour, minimal code and a reproducible test without secrets. Ask for the cause, smallest patch, regression test and remaining risks. For prompt 101, specify field mappings, source of truth, rate limits, retries, duplicate keys and a reconciliation report before connecting a CRM. Test an interrupted write and a retry. A webhook response does not prove the destination record is correct.

Release gate

Prompt 102 creates a staged release checklist: owner approval, security review, backup, rollback, test evidence, monitoring and recovery owner. Preview first; staging second; production only after a separate decision. Domain purchase, hosting charges, messaging costs and account changes need explicit authority. These are external-tool-dependent build briefs, not documented native Xpress AI code generation.

A launch or anniversary people can understand

Start with the story

A launch explains who you help, what is opening, where, when and what the next step is. An anniversary explains the real history, people and work, with permission to use their images and words. Supply dates and evidence. Avoid invented milestones or claims that a business is the largest, first or best. Use prompts 103-108 for video, stills, carousel, correspondence and repurposing.

A complete asset list

Prepare a one-page brochure; 30-second hero-video script with shot list; short vertical edit; square image brief; five-card carousel; landing page; banner; invitation email; SMS; reminder; confirmation; weather/cancellation notice; attendee follow-up; non-attendee follow-up; and a staff response sheet. Each asset uses the same approved facts, offer terms and URL. Confirm captions, music, portrait and testimonial rights. A designer/editor assembles and checks actual files; the assistant must not claim a render it has not inspected.

A fictional launch pack

Harbour Bike Care is a fictional workshop launching a free, adult-attended bike-care demonstration on [verified date] at [venue]. Headline: "Meet the workshop. Learn one useful bike-care check." Brochure panels: who it suits; what happens; date/venue/access; free-session conditions; registration link/QR; contact. Video: 0-5s workshop exterior; 5-15s mechanic demonstrates a visual check; 15-25s owner explains the session; 25-30s event details and registration. Do not imply a free repair or safety certification.

Copy-ready correspondence, with placeholders

Email subject: "A bike-care demonstration at [venue] on [date]". Body: "Hi [first name], Harbour Bike Care is opening at [address]. Join our free demonstration on [date/time/timezone]. We will show [approved activity]. Register at [tested link]; spaces are limited to [real capacity]. Questions? Contact [sender details]. [Unsubscribe]." SMS: "Harbour Bike Care: join our demonstration on [date/time] at [venue]. Details/registration: [link]. Marketing opt-out: [supported mechanism]." Banner: "Bike-care demonstration | [date/time] | [venue] | Register [QR/link]". These are fictional templates, not approved sends.

The carousel and follow-up

Card 1: event promise. Card 2: one useful learning outcome. Card 3: who it suits and what to bring. Card 4: date, location and accessibility. Card 5: register with genuine capacity/terms. Attendee email: "Thanks for joining. Here is the [requested resource]. If you asked about [service], reply and we can discuss it." Non-attendee email: "Sorry we missed you. Here is the resource you requested. Future marketing only follows the choice you made." Survey: one useful question and an optional reply request. Do not add everyone to recurring promotions.

A sale calendar based on capacity, not noise

Pick the events that fit

Use prompt 109 to build a year-specific plan. Black Friday, Cyber Monday, Australian Boxing Day, Easter and New Year need actual dates, local trading conditions, stock, staffing and audience fit. Add locally relevant school holidays, business anniversaries or cultural celebrations only when suitable. Confirm calendars and sensitivities rather than inventing dates. Black Monday has no single assumed meaning here: prompt 141 asks the business to define its own campaign and date. Do not confuse it with Cyber Monday or imply official-holiday status.

One event, four controlled phases

Preview introduces a real offer. Opening states actual prices, conditions and fulfilment. Reminder goes only to eligible non-buyers who have not opted out and have not exceeded the agreed frequency. Last call is used only if the genuine closing time and availability still support it. Stop when stock or capacity runs out. Reconcile overlaps so the same buyer does not get separate Black Friday and Cyber Monday pressure messages. Automated dispatch is a configured workflow, not a Co-Worker capability assumed from a prompt.

Seasonal adaptations

Black Friday: SKU-level stock and genuine reference prices. Cyber Monday: access entitlements, recurring charges, refund/support terms and failed-order handling. Boxing Day: item condition, trading hours and real stock; a change-of-mind policy does not remove applicable consumer rights. Easter: adult contacts, supervision and weather plans for family events. New Year: realistic capacity and suitability, no transformation guarantee. Closing down: verify the closure is genuine, state the actual scope, and do not reset a false final deadline. Prompts 110-116 cover these jobs.

Offer maths and truth

Prompt 142 compares discount, bundle and value-added service using supplied costs. Calculate unit contribution after variable fulfilment costs, then subtract campaign costs consistently. Do not call a high response rate profit. Draft price comparisons only from genuine evidence. Avoid invented scarcity, savings and countdowns. Check consumer-law wording against current official guidance before use.

A fictional clearance pack

A fictional homewares shop has 12 display lamps with disclosed marks. Landing headline: "Display-lamp clearance: condition shown for every item". Email subject: "12 display lamps, with condition and prices listed". SMS: "[Shop]: display-lamp clearance details and current stock: [link]. Conditions apply. [Supported opt-out]." Social caption: "Inspect the condition photos and individual price before buying. Availability updates at [link]." Banner: "Display clearance | [actual dates] | Condition disclosed". Staff reply: "Please check item [ID] for its marks, price and availability. Our stated change-of-mind policy is separate from your applicable consumer rights." Do not reuse this copy without actual facts and local review.

CRM: useful segments, durable consent

Separate interest from permission

A tag such as interested:tour says what someone asked about, not whether email/SMS marketing is allowed. Keep channel eligibility separate: consent source, wording/version, date/time, scope, withdrawal and suppression. Do not overwrite historical evidence with a new campaign tag. Membership of an event, past purchase, public directory or imported spreadsheet is not by itself permission to send every promotion. Prompts 117, 118, 120 and 130 produce audit and configuration specifications.

A small, workable schema

Suggested fictional fields: contact_id, email/SMS preference, consent_source, consent_at, notice_version, permitted_purpose, opt_out_at, suppression_reason, event_id, requested_next_step and responsible_owner. Suggested non-sensitive tags: interest:service, event:registered, event:attended, followup:requested, campaign:source. Use only necessary fields. A qualified administrator decides the actual schema, access and retention. Avoid health details, child profiles or sensitive-property-buyer labels in a general campaign record.

Design the selection before writing the message

Define eligible audience as verified purpose/channel permission plus campaign relevance, minus opt-outs, complaint suppression, duplicate records, recent purchasers where irrelevant and frequency caps. Generate a count and exclusion report before dispatch. Sample included and excluded rows manually using synthetic records first. Do not upload a full customer export to an unapproved assistant. Connected CRM analysis in Xpress AI is documented as account-dependent and draft-only; explicit tag creation and sending remain to be verified.

The test no campaign can skip

Create synthetic contacts: eligible adult; email-only consent; SMS-only consent; opt-out; duplicate; missing evidence; already registered; purchaser; bounced address; and an interrupted workflow. Verify each expected path. Trigger an opt-out while a scheduled sequence is waiting: confirm all affected marketing stops, not merely the next list export. Inspect provider delivery/error logs and downstream records. No anti-spam or deliverability guarantee follows from a tag.

Surveys that lead to an action

Ask less and explain why

Prompt 121 drafts a short feedback survey: what worked, what could improve, one relevant rating and an optional contact request. State purpose and privacy notice, make optional fields clear, and avoid collecting sensitive details you do not need. Keep marketing consent separate and unticked by default in the draft specification. A survey response is not automatically permission to publish a quote or contact the person about unrelated offers.

Build and test

A proposed setup is form/survey -> validated CRM fields -> staff notification -> requested acknowledgement -> improvement queue. Confirm the available form builder, conditional logic, data destination and consent controls in the actual account. Test phone layout, labels, required fields, duplicate submissions, opt-outs, failure messages and restricted access. Tell the owner where responses are stored and who can see them.

A fictional survey and response

Question 1: "What was most useful about the demonstration?" Question 2: "What should we change?" Question 3: "Would you like a reply about your feedback? Yes/No." Optional contact field shown only when needed. Acknowledgement: "Thanks for your feedback about [event]. We use it to improve the session. If you asked for a reply, [team] will contact you using the details you gave." Prompt 122 groups themes, flags uncertain interpretation and proposes an owner/action/date table. Do not infer a customer's motives from a rating.

Close the loop without review gating

Keep complaints and praise in the same improvement process. Ask for reviews fairly rather than sending only high scorers to a public review site. Do not offer a reward for a positive review or hide criticism by presenting a filtered sample as representative. A testimonial needs separate consent for its actual use and channels.

Testimonials: collect, edit, approve, then publish

Four separate permissions and jobs

Prompt 123 specifies a collection journey; prompt 124 prepares a truthful editing brief. Check permission to request, record, edit and publish on the intended channels. A customer agreeing to private feedback has not approved an advertisement. Explain how the clip will be used, where, how long and how to ask about withdrawal. Do not promise a universal right to retract material already redistributed; set a practical removal process and get legal advice where needed.

The proposed technical path

Request -> collector link -> upload/record -> restricted storage -> authenticity/permission check -> human edit -> speaker/owner approval -> website widget or approved channel -> removal log. Video collectors/widgets and received-video triggers are generic platform-documented features, not verified Xpress AI account availability. Confirm plan, permissions, storage and export before building. Automated testimonial editing is undocumented: use a person or separately approved editor. Do not state that collection automatically creates and posts a finished ad.

A fictional request and editing brief

Request: "Would you be willing to share a short, honest account of your experience with [business]? It is optional. If you agree, [collector link] explains recording and proposed use. You can choose what to discuss; no positive review is required." Editing brief: preserve the customer's actual words and meaning; remove only agreed pauses or irrelevant material; keep qualifying context; correct captions against the recording; do not add fake voice, claims or results. Show the final cut and channels for approval.

Publishing and removal checks

Verify readable captions, identity/likeness permission, music/assets, claim evidence, end-card links and channel scope. Log source file, approved cut, approval date, destinations and removal owner. Test an unpublished/rejected clip, a missing permission, a failed upload and a removal request. A widget on a website needs a real embed and an inspected live page. A queued social post is not proof of publication.

Social publishing with a real approval queue

A weekly queue

Prompt 125 turns approved source facts and rights-cleared assets into a channel-specific queue. Record post ID, copy version, media file, alt text, link, channel, intended time/timezone, reviewer and status. Draft -> review -> approved -> scheduled -> verified published -> measured. A revision after approval returns to review. Keep a manual fallback and a named person responsible for failures.

What the product evidence does and does not settle

Xpress AI materials describe planning, drafting and approval. Its prompt library says Facebook/Instagram live publishing is switched on account by account, and LinkedIn remains manual. A Sofia page describes broader publishing, so the product pages conflict. Use the conservative path: confirm Facebook/Instagram availability in the actual account; draft LinkedIn posts for manual publication until the conflict is resolved. Do not claim automatic cross-channel publishing by default.

The launch-week example

Monday: useful tip from the approved demonstration. Wednesday: owner introduction using permitted footage. Friday: event details with genuine remaining capacity. After the event: requested resource and a consented community recap. Use different aspect ratios and copy lengths rather than blindly duplicating the same asset. Pause the queue if opening hours, prices, venue, availability or permissions change.

Check the result, not only the scheduler

Inspect the published post as the intended audience sees it. Check image crop, complete caption, qualifiers, link destination, time and account. Log failures; do not retry a timed-out publish until checking whether it already landed. Compare useful enquiries, attendance and costs rather than treating reach alone as success.

QR codes, forms and event replies

A QR code is a route, not consent

Prompts 126-128 specify QR registration, post-service choices and measurement. The code should open a clear, mobile-readable destination with a visible business identity and non-QR short-link fallback. Print-test the real code at the intended size, contrast and viewing distance with multiple phones. A scan is not a registration and is not proof of a person's identity or marketing permission.

A proposed registration workflow

QR -> event page -> adult contact form -> validation and duplicate check -> event record -> confirmation -> staff task -> reminder under the approved purpose -> attendance status -> requested follow-up. Verify every supported feature in the account. A simple form-based check-in does not issue a unique ticket or prevent repeated submissions by itself. Separate event/ticketing modules may be beta and account-dependent; do not rely on them without verification. Use a staffed registration list as a fallback.

Practical automatic replies

Confirmation: "Your registration for [event] on [date/time/timezone] at [venue] is recorded for [number] places. [Important terms/access]. Change your registration at [tested route] or contact [team]." Waitlist: "You are on the waitlist, not confirmed. We will contact you if a place opens." Cancellation: "[Event] on [date] is cancelled. [Refund/reschedule facts, if approved]. Contact [team]." These are draft transaction-specific messages; do not attach an unrelated offer or bypass channel requirements.

Measurement without surveillance

Use a campaign/source identifier to compare placements, not unnecessary fingerprinting. Count page visits, completed registrations, duplicate rejects, attendance and requested enquiries separately. Minimise data and apply the business's retention policy. Check that exported attendee lists do not silently include people who opted out of future marketing.

Event companies: an end-to-end production brief

Sell the experience truthfully

Prompt 129 prepares the complete event campaign; prompt 130 cleans the database specification. Supply event objective, audience, approved programme, speakers/vendors, venue access, capacity, ticket/refund rules, safety responsibilities, weather plan and budget. Do not announce unconfirmed partners or acts. Separate confirmed attendees, waitlist, vendors, staff and people eligible for future marketing.

The correspondence map

Before launch: brochure, registration page, banner, hero video, carousel and staff FAQ. Invitation: email/SMS only to eligible contacts. Registration: confirmation or waitlist, not both. Pre-event: access, parking, arrival time, accessibility contact and cancellation route. Event day: signed check-in list, clear wayfinding and help contact. After: attendee thanks/resource, non-attendee requested resource, feedback survey, permission-based testimonial invitation and next-event invitation only within consent.

A fictional local-business showcase

Brochure headline: "Meet local makers at [venue] on [date]." Video: show permitted vendor work, explain what visitors can do, state entry conditions. Email: "You asked about local-business events. [Approved showcase details]. Registration: [link]. [Sender/opt-out]." Reminder: "Your [showcase] registration is confirmed. Doors open [time]; arrive via [entrance]. Questions: [contact]." Follow-up: "Thank you for attending. Here are [requested links]. We welcome honest feedback at [survey]." Every placeholder must be filled from the approved brief.

The operations handover

Assign owners for capacity, waitlist promotion, refunds, changes, attendee access and incidents. Test cancellation, duplicate registration, opt-out during a queued sequence, sold-out state and a disconnected integration. Do not call the campaign ready until the administrator demonstrates the end-to-end paths and the owner approves the actual audience and assets.

Automotive: launches, offers and community road trips

New-car preview or showroom offer

Prompts 131 and 132 define the model/offer facts, actual arrival status, pricing/finance exclusions, display/demo conditions and audience interest. Invite relevant past buyers only within permission; a purchase history does not authorise indefinite contact. Do not invent availability, safety ratings, delivery dates or finance approvals. A regulated finance claim requires qualified review.

A fictional showroom-launch asset pack

Brochure panels: model facts from approved manufacturer material; display/test-drive conditions; event date/venue; registration; contact and terms. Video: exterior detail, genuine interior footage, staff invitation, event card. Carousel: what is new; who it suits without suitability promises; verified features; event details; registration. Email: "You asked about [model/category]. We are holding a preview on [date]. [Approved facts]. Reserve a place at [link]. [Sender/opt-out]." SMS: "[Dealer]: [model] preview [date/time]. Details and conditions [link]. [Supported opt-out]." Follow-up: "Thanks for visiting. You requested [brochure/test-drive information]. Here it is. Reply if you want a staff member to discuss it."

A road trip is also a safety event

Prompt 133 covers a community drive with verified route, stops, permission, capacity, weather, accessibility and qualified safety planning. Do not encourage speed, unsafe convoy behaviour, distracted filming or a promise that insurance covers everyone. A person confirms road/venue conditions, permits, emergency contacts and cancellation thresholds. Share attendee contact details only for an agreed need.

The road-trip correspondence

Invitation states route summary, date, adult participation conditions, costs and registration. Confirmation states meeting point/time and the approved participation pack. Briefing repeats safe-driving and independent-driver responsibilities, break stops and help contact. Weather/cancellation notice gives the actual decision and next step. Post-event recap uses only permission-cleared photographs. Prompt 134 separates attendance, requested test drives, service enquiries and optional future-event consent in the follow-up specification.

Premium property tours: discretion and useful detail

Design the itinerary before promoting it

Prompt 135 builds a premium city/property tour from actual listings, access approvals, transport capacity, route timing and licensed-agent-reviewed descriptions. Confirm each vendor's viewing permission and what may be photographed. Do not publish exact private-home details to an unrestricted list when a discreet registration path is intended. Describe opportunities without predicting capital growth or a guaranteed investment return.

The complete tour pack

Brochure: tour purpose, broad areas, verified highlights, date/time, access conditions, transport, price if any, registration and contact. Video: permitted street/area footage and authorised property clips, not images implying access to unavailable homes. Carousel: neighbourhood context, verified property features, logistics, suitability limits, registration. Email: "You requested information about [area/type]. Join a guided viewing tour on [date], subject to confirmed access. Details and registration: [link]. [Sender/opt-out]." SMS: "[Agency]: requested property-tour details for [date]: [link]. Access conditions apply. [Supported opt-out for marketing]."

Qualification without invasive profiling

Prompt 136 uses volunteered practical preferences: location, property type, accessibility, timing and an optional budget band relevant to the tour. Do not infer wealth, ethnicity, family status or other sensitive traits from names, photos or neighbourhood. A licensed professional handles financial/suitability advice and verifies local advertising and anti-discrimination obligations.

From registration to follow-up

Confirm places and access, not an unconditional property reservation. Send meeting point and changes only to registered participants through approved channels. Record attendance and requested next steps. Follow-up: "Thanks for joining. You asked about [property/resource]. Here is the approved material. Would you like the agent to contact you?" Keep property-owner and attendee privacy separate. A person approves every client-facing description and route change.

Childcare and learning events: adults first

Invite the community, protect children

Prompts 137 and 138 cover parent-supervised open days and painting, phonics or maths activities. Confirm age suitability, staffing, capacity, accessibility, allergies/material safety, supervision and safeguarding with qualified staff. Do not claim a casual event provides childcare unless the actual service and requirements support that. Registration should use adult contacts and the minimum information needed; no public child profiles or photos without appropriate permission.

The correspondence kit

Brochure: activity, intended age range, parent/carer attendance, date/time, venue/access, cost, capacity, materials, registration and contact. Video: staff/setting or permitted demonstration, avoiding unidentified children. Carousel: activity; what adults/children can expect; supervision; practical details; register. Email: "Join our parent/carer-attended [painting/phonics/maths] session on [date/time] at [venue]. [Qualified-staff-approved details]. Register at [link]. [Sender/opt-out]." SMS: "[Centre]: requested [activity] details [date/time]: [link]. Parent/carer attendance required. [Supported opt-out where marketing]."

Fictional painting-session run sheet

Arrival: staff welcome adult/carer and confirm registration privately. Opening: explain materials and supervision. Activity: qualified staff lead the approved task; no promise of a learning outcome. Close: optional resource, feedback route and clean-up. Do not post attendance lists. Photo permission is separate from participation and future marketing choices. A child can attend without agreeing to promotional photography where the event allows it.

Follow-up with a limited purpose

Confirmation repeats supervision, what to bring and the change/cancellation route. Reminder supplies practical information, not unrelated enrolment pressure. Follow-up: "Thank you for joining. Here is the [requested activity sheet]. If you want information about [future sessions/enrolment], you can choose it at [link]." Separate attendance from requested enrolment contact. Never interpret a child's artwork, survey or behaviour as a diagnosis or sensitive marketing profile.

Adapt the method to other businesses

Hospitality and trades

Prompt 139 creates a local hospitality community event with real food/allergen facts, capacity and weather contingencies. Prompt 140 creates a trade demonstration with qualified safety review; do not turn education into unlicensed advice or imply attendees can safely do regulated work. Both use the same brochure/video/carousel/invitation/confirmation/reminder/follow-up map, with staff approving actual facts and terms.

Fitness and professional services

Prompt 143 covers a beginner fitness workshop with qualified suitability/safety review and no medical or weight-loss guarantees. Prompt 144 covers a professional-services educational seminar. Keep general education separate from individual legal, financial, tax or health advice. Do not collect personal case histories in public comments or infer a sensitive audience from profile data.

The compact campaign master brief

Business and owner: [ ]. Objective and measure: [ ]. Verified audience/purpose/channel permission: [ ]. Real offer and evidence: [ ]. Date/timezone, venue/capacity and costs: [ ]. Feature/account verification: [ ]. Asset list: brochure, video, image, carousel, landing page, email, SMS, banner, replies and follow-ups. CRM schema/suppression: [ ]. Human approvals: [ ]. Test evidence and fallback: [ ]. Stop rules: [ ]. Measurement and retention owner: [ ]. Do not launch with missing load-bearing fields.

A first pilot worth running

Choose one event, one purpose and the smallest useful audience after approval. Have staff inspect every sample route before scale. Measure outcomes against a baseline and include review time, errors, opt-outs, support and refunds. Keep what helps; stop what creates confusion. Expansion is a decision supported by evidence, not the automatic next step.

Source notes and account-verification limits

Product evidence, checked 29 October 2026

Xpress AI prompt library: https://xpressaicoworker.com/prompt-library/ . Product planning/CRM/publishing claims: https://www.xpressaicoworker.com/coworker-piper.html and https://www.xpressaicoworker.com/coworker-sofia.html . The library's manual LinkedIn and per-account Facebook/Instagram limits take the conservative role in these examples. Xero remains unresolved: pricing names a direct feature while the library says connecting Xero is coming soon. Confirm actual availability; do not assume write-back. Sources are vendor statements, not execution tests.

Generic platform research is not Xpress availability

Research used official platform documentation for forms/surveys, CRM lists/DND, consent capture, video collectors/widgets, QR check-in, social planning and event workflows. Those documents describe generic features, not what this service or account offers. The setup examples above are specifications to discuss with the provider, not instructions proving a feature exists in Xpress AI. App/code and automated testimonial-editing execution remain outside documented product support. Keep a written capability checklist and test workspace before implementation.

Australian marketing and consumer guidance

ACMA: https://www.acma.gov.au/avoid-sending-spam . Commercial email/SMS marketing needs consent, sender identification and a clear unsubscribe. Honour unsubscribe requests within five working days, without requiring login or extra personal information. Check the current rule and channel mechanics before use. OAIC direct marketing guidance: https://www.oaic.gov.au/privacy/australian-privacy-principles-guidelines/chapter-7-app-7-direct-marketing . Applicable privacy duties depend on the business and circumstances. ACCC misleading claims guidance: https://www.accc.gov.au/consumers/advertising-and-promotions/false-or-misleading-claims . Claims, prices, savings, scarcity and testimonials need truthful evidence. This is general education, not legal advice.

What has not been tested

The prompts and fictional packs have been written and statically reviewed, not run as live campaigns or verified in a customer Xpress AI account. No accounts were changed, contacts messaged, websites deployed, purchases made or media published for this book.

Expected outputs are targets for review, not proof of useful results. Before relying on a workflow, test product access, privacy, outputs, actions, failure recovery and actual downstream state under the business owner's authority.

48 AUTHOR-WRITTEN WORKFLOW PROMPTS

Distinct from the 96 public-library prompts. Expected outputs are review targets, not execution results. Prompts 97-102 require a suitable external coding assistant or developer. All other configured workflows require actual feature/account checks before implementation.

97. Build a service-business website prototype

EXTERNAL TOOL / DEVELOPER WORKFLOW. Not a documented native Xpress AI capability.

Inputs to supply

Business facts, audience, services and approved claims; brand assets and usage rights; sitemap; call to action; hosting preference; accessibility and privacy requirements.

Copyable prompt

Act as my website planning and coding assistant. For [business] serving [audience/location], use [approved facts/assets] to build a local preview of a responsive five-page website: Home, Services, About, FAQs and Contact. First identify missing facts, then provide a sitemap, section-by-section copy, design tokens and runnable source files using [stack]. Include navigation, mobile layouts, descriptive alt-text placeholders and a contact form in demo mode. Do not invent testimonials, qualifications or a working booking connection. Explain how to run it locally and give an acceptance-test checklist. Keep credentials out of the code. Do not deploy, buy a domain or connect live data.

Expected output

Sitemap; copy; source-file tree; local run commands; demo form; mobile/accessibility test list.

Fictional example

Fictional Harbour Bike Care needs a workshop site. Its only supplied facts are repairs, servicing and a stated suburb. The preview uses an enquiry button, not invented prices or a fake instant-booking promise.

Review gate

A person checks every business claim, mobile view, keyboard path and form validation. A developer reviews security and live-form handling before any release.

98. Build a consent-aware campaign landing page

EXTERNAL TOOL / DEVELOPER WORKFLOW. Not a documented native Xpress AI capability.

Inputs to supply

Approved offer, actual price and exclusions, capacity, start/end timezone, form fields, consent wording, privacy notice and destination URL.

Copyable prompt

Create a campaign landing-page specification and local HTML/CSS/JavaScript prototype for [approved offer]. Put eligibility, price, expiry and exclusions beside the call to action. Use a short form with separate unticked choices for [email/SMS marketing], plus a transactional registration purpose. Specify validation, success/error states, duplicate submissions, source attribution and a bot-protection plan. Produce a field-to-CRM mapping and test fixtures. Do not connect or publish; mark every endpoint as a placeholder.

Expected output

Landing-page copy and local prototype; form/CRM map; consent-state tests; release checklist.

Fictional example

A fictional studio has 20 paid trial places. Its page says exactly what the trial includes and uses a waitlist after capacity is reached, rather than continuing to advertise scarce places.

Review gate

Form submission alone is not blanket marketing consent. Test failure paths and independently verify price, capacity and terms.

99. Prototype an internal job-tracking app

EXTERNAL TOOL / DEVELOPER WORKFLOW. Not a documented native Xpress AI capability.

Inputs to supply

User roles, approved job stages, minimum fields, synthetic sample records, platform preference, retention policy and access rules.

Copyable prompt

Design and scaffold a local-only [stack] app for [business] to track jobs from enquiry to completion. Use synthetic records only. Define the data model, role permissions, status changes, search/filter views and audit events. Provide runnable source, a seed script, validation and unit tests. Show empty, loading, error and permission-denied states. Put authentication and external integrations behind explicit stubs. Explain what is missing for production and how to erase the demo. Do not ingest customer data or deploy.

Expected output

App specification; schema; working local scaffold; tests; production-gap list.

Fictional example

A fictional electrical firm uses quote_requested, site_visit, approved and completed stages. A technician can see assigned jobs but not invoice or payroll data.

Review gate

Local functionality is not production readiness. Review authorization, backups, audit logs and secrets before a real system is considered.

100. Fix a code defect with a regression test

EXTERNAL TOOL / DEVELOPER WORKFLOW. Not a documented native Xpress AI capability.

Inputs to supply

Minimal reproducible code, expected and actual result, redacted logs, runtime versions, test commands and constraints.

Copyable prompt

Investigate this reproducible bug: [description/code/logs]. Explain the root-cause hypothesis, write a test that fails before the fix, propose the smallest patch and show how to run the test suite. Preserve existing interfaces unless you explain why a change is needed. Flag security or data-loss risk. Separate tests you actually ran from commands you only propose. Never claim the patch passed without test evidence. Do not push, merge or touch production.

Expected output

Root-cause note; minimal patch; regression test; execution evidence or clearly unrun commands.

Fictional example

A fictional booking form accepts an end time earlier than its start time. The patch validates the ordering and tests equal, earlier and later times, with timezone handling made explicit.

Review gate

A developer checks dependencies and edge cases. Do not paste keys, session cookies or personal customer logs.

101. Specify and test a CRM integration

EXTERNAL TOOL / DEVELOPER WORKFLOW. Not a documented native Xpress AI capability.

Inputs to supply

Official API documentation, allowed fields, test environment, authorization scope, event schema, retry rules and data-retention limits.

Copyable prompt

Using only [official API documentation] and [synthetic fixtures], design an integration that maps [form event] to [CRM object]. Produce a field mapping, idempotency strategy, validation, error handling, rate-limit/backoff plan and dead-letter review queue. Draft example code with environment-variable placeholders, not secrets. Write contract tests for duplicate events, missing consent, withdrawn consent, malformed payloads and provider failure. Do not call a live endpoint or change records.

Expected output

Integration design; example code; contract tests; rollback and reconciliation plan.

Fictional example

One person registers twice with the same event ID. The test expects one registration update, not two contacts and two welcome sequences.

Review gate

An API advertised by another platform does not establish access in your Xpress AI account. Confirm endpoint, scope, plan and owner approval before implementation.

102. Prepare a staged website or app release

EXTERNAL TOOL / DEVELOPER WORKFLOW. Not a documented native Xpress AI capability.

Inputs to supply

Build artifacts, actual test results, staging URL if available, owner-approved release scope, backups, monitoring and rollback route.

Copyable prompt

Prepare a release-readiness review for [website/app]. Inspect [artifacts/results] and list passed, failed and unverified checks without filling gaps. Cover mobile/keyboard use, form delivery, access controls, content rights, privacy, dependency vulnerabilities, error logging and backup restoration. Draft a staged release plan with a responsible person, go/no-go gates, smoke tests and rollback steps. Do not deploy. If no working restore route is evidenced, mark release blocked.

Expected output

Evidence-based readiness table; release plan; smoke tests; rollback runbook.

Fictional example

A fictional prototype renders correctly but has no verified form destination. The review marks enquiry capture unverified and holds launch instead of treating a pretty page as complete.

Review gate

A human release owner authorizes deployment. Generated tests and plans are not evidence that a system is secure.

103. Plan a business-launch video

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Business facts, audience, offer, launch date/timezone, approved footage, logo, spokesperson consent, music rights, budget and channels.

Copyable prompt

Create a production-ready brief for a [30/60]-second business-launch video for [business]. Use only [approved facts]. Give a hook, timed scenes, voiceover, on-screen text, shot list, footage/asset checklist, captions and channel-specific aspect ratios. Mark missing footage and licensed assets. End with [approved CTA]. Provide an editing handoff and review checklist, not a claim that a final video has been rendered. Do not generate a person's likeness or publish.

Expected output

Timed script; storyboard; shot list; captions; editing and channel-export brief.

Fictional example

Fictional Northside Pilates is opening a new studio. Its video shows the space and timetable, not unsupported health outcomes or fabricated member testimonials.

Review gate

Check dates, footage/likeness permissions, captions, music licences and offer terms before production or publication.

104. Create a business-anniversary film

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Verified timeline, permitted archive photos/video, real milestones and sources, consented quotes, brand voice and runtime.

Copyable prompt

Plan a [runtime] anniversary film for [business] marking [verified anniversary]. Build a timeline from [source facts] and flag any unsupported milestone. Write a story arc, interview questions, voiceover, shot list, lower thirds and a final thank-you/CTA. Separate real quotes from draft interview prompts. Provide a rights register and an editor's assembly order. No invented revenue, years, client counts or quotes; no publication.

Expected output

Fact-checked narrative; timeline; interview pack; archive/rights register; edit plan.

Fictional example

A fictional bakery supplies its opening year and three dated archive photos. The film celebrates those facts and leaves an unverified customer count out.

Review gate

Anniversary age must be calculated from the actual opening date. Ask permission for customer/staff appearances and archived media.

105. Create a launch image campaign

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Approved product/business facts, brand kit, offer, dimensions, asset rights, date and call to action.

Copyable prompt

Prepare three distinct visual concepts for [launch]. For each, give composition, exact headline/body/CTA copy, accessible colour/contrast notes, image-generation or designer brief, and platform sizes. Keep text editable and label synthetic imagery. Supply alt text and a final fact/rights checklist. Do not invent a finished image if you only produced instructions, and do not post anything.

Expected output

Three art directions; editable copy; designer/generation briefs; dimensions and alt text.

Fictional example

A fictional repair shop chooses a tool-detail image, a founder portrait and a simple opening-date card. None depicts a fake customer endorsement.

Review gate

Review actual pixels after rendering. AI image text, logos and product details can be wrong even when the brief is correct.

106. Build an educational launch carousel

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Audience problem, approved facts, product limitations, offer, visual style and channel slide requirements.

Copyable prompt

Write an eight-slide carousel introducing [business/product] to [audience]. Give each slide a single job: hook, problem, explanation, process, example, limitations, offer and CTA. Include exact text, layout notes, suggested factual or illustrative visual, alt text and caption. Keep proof claims sourced and examples labelled fictional. Provide a designer handoff and final review checklist; no publication.

Expected output

Eight-slide copy/layout plan; caption; alt text; source notes and designer brief.

Fictional example

A fictional bookkeeping service explains the records needed before a consultation. Its example is fictional and makes no tax-saving guarantee.

Review gate

Check that small text remains readable on a phone and that the carousel does not hide exclusions until the last slide.

107. Prepare a complete launch correspondence pack

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Approved launch brief, capacity, terms, landing-page URL, event time/timezone, consented audience segments and channel availability.

Copyable prompt

Build a draft-only launch campaign for [brief]. Produce a campaign calendar, brochure layout/copy, banner copy, three social posts, one carousel outline, launch email plus two follow-ups, two SMS options, video script and an internal staff FAQ. Keep offer details identical across assets. Supply segment rules, exclusions, frequency caps, suppression checks and owner approval gates. Include a test plan and measurement sheet. Do not send, schedule, spend or publish.

Expected output

Full launch asset pack; calendar; audience rules; approval and test checklist; measurement sheet.

Fictional example

A fictional pet-grooming studio launches a weekend open day. Existing clients and unconfirmed leads get different draft paths; contacts without channel consent are excluded from marketing.

Review gate

Every outgoing version needs verified links, sender identity, terms and appropriate opt-out mechanics before approval.

108. Repurpose approved launch footage

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Original approved footage, transcript, usage/likeness/music rights, target channels, desired lengths and supported editing tools.

Copyable prompt

From [approved footage/transcript], prepare an editing plan for one hero video, three short clips and a still-image set. Identify exact source timestamps, truthful hooks, captions, safe crops, end cards and export settings. Preserve the speaker's meaning; flag any edit that changes context. Create a rights and approval checklist. If an editing tool is available, describe the necessary steps; do not claim edits or exports happened without inspecting the files. Do not publish.

Expected output

Timestamped edit decision list; clip scripts/captions; export brief; rights checklist.

Fictional example

A fictional café owner's 90-second introduction becomes three factual clips: location, menu focus and opening hours, using only permitted source footage.

Review gate

Automated captions and cuts need human review. Cropping must not remove price qualifications or alter a testimonial's meaning.

109. Build the sale calendar and offer economics

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Actual product/service margins, stock/capacity, past campaign data if available, eligible audiences, budget limit, country and business calendar.

Copyable prompt

Create a twelve-month campaign planning worksheet for [business/country]. Consider Black Friday, any verified Black Monday event the business actually intends, Cyber Monday, Boxing Day in Australia, Easter, New Year and relevant local/cultural events. Do not invent dates or assume every event fits. For each chosen event, define objective, audience need, capacity, draft offer, margin inputs, terms, channels and lead time. Show break-even formulas and label missing figures. Propose no launch until owner-approved dates, economics and terms are supplied. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Campaign calendar; offer-economics worksheet; event-selection rationale; missing-input list. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional garden centre has limited delivery capacity. It chooses a spring event and Boxing Day clearance rather than discounting every holiday.

Review gate

Confirm dates by year and locale. A discount is not profit; distinguish gross margin, campaign costs, refunds and capacity limits.

110. Prepare a Black Friday limited-stock campaign

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Actual stock by SKU, genuine reference prices, sale prices, inclusions/exclusions, fulfilment limits, timezone and consented segments.

Copyable prompt

Create a draft Black Friday campaign for [approved products]. Build a stock-aware offer table and a sequence for preview, opening, reminder and genuine last call. Provide landing-page copy, email, SMS, banner, carousel and social copy; specify stop rules when stock or capacity runs out. Never invent a countdown, original price, scarcity or savings. Include suppression and purchase-exclusion logic, test cases and approvals. No sending or scheduling. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Stock-aware multi-channel asset pack; stop rules; test cases; approvals. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional shop has 40 helmets at an approved sale price. The last-call message is conditional on live stock and is cancelled if the range sells out.

Review gate

Price comparisons must be genuine. Do not advertise sold-out stock or use a resettable countdown as false urgency.

111. Design a Cyber Monday digital offer

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Eligible digital product/service, access conditions, real prices, support capacity, entitlement terms, refund/cancellation rules and event timezone.

Copyable prompt

Prepare a Cyber Monday campaign for [digital/service offer]. Explain exactly what buyers receive, when access begins, any usage limits and who it is unsuitable for. Draft a landing page, comparison table, email/SMS sequence, social posts and checkout FAQ. Create entitlement, payment-failure, duplicate-order and support-escalation test cases. Use only approved terms and do not promise activation or revenue. Draft-only; no checkout or live automation. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Offer/entitlement brief; campaign copy; support FAQ; order-failure test matrix. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional design course offers a live workshop bundle. Its materials distinguish live attendance from recording access and state the real seat cap.

Review gate

Confirm access, refund terms and support capacity. Cyber Monday is not permission to hide recurring charges or paid add-ons.

112. Plan an Australian Boxing Day clearance

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Old stock list, condition, sizes/variants, genuine prices, warranty/return information, trading hours, fulfilment limits and dates.

Copyable prompt

Build a Boxing Day clearance plan for [Australian business]. Group stock by availability and condition, draft transparent product/offer copy, store signage, email, SMS, social posts and a stock-update runbook. Explain that a change-of-mind policy is separate from applicable consumer guarantees; flag legal wording for review rather than inventing exclusions. Add suppression, inventory-sync and sold-out tests. No publication or record changes. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Clearance pack; condition/stock table; signage; inventory tests and review gates. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional homewares retailer marks display items clearly and lists scratches in the product description instead of calling them new.

Review gate

Do not use blanket no-refund language to override legal rights. Have the actual terms checked for the business and jurisdiction.

113. Create an Easter family-event campaign

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Confirmed dates/venue, age range, activity and accessibility details, capacity, supervision plan, food/allergen facts, price and registration terms.

Copyable prompt

Prepare an Easter event campaign for [business/community]. Produce a family-friendly event concept, run sheet, registration-page copy, poster, email, SMS and social sequence. Separate essential event updates from optional marketing consent. Include capacity/waitlist rules, cancellation/weather messages and photo-consent choices. Do not collect children's personal information in public comments. Draft only. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Event concept; run sheet; registration and communications pack; privacy/safety checks. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional community café runs a parent-supervised decorating session. Registrations collect adult contact details and do not imply childcare is provided.

Review gate

Check food safety, supervision, capacity and local requirements. Do not turn an event registration into unrestricted family marketing permission.

114. Build a New Year capacity-led offer

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Actual January capacity, service suitability, approved prices, booking windows, exclusions and evidence for any outcome claim.

Copyable prompt

Prepare a New Year campaign for [service business] that fills [specific capacity] without misleading urgency. Design an offer tied to a clear customer need, not an invented guarantee. Draft an email, two SMS options, social post, landing-page outline and follow-up sequence. Include eligibility, timezone, cut-off and a stop rule when capacity is filled. Exclude booked customers and opted-out contacts. Do not send or book. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Capacity-led offer brief; draft assets; segment/exclusion logic; stop rule. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional car-detailing business has six weekday appointments. It offers a defined package for those slots and stops reminders once they are taken.

Review gate

Use verified availability. Avoid health, financial or transformation promises unsupported by evidence.

115. Create a respectful festive campaign

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Chosen cultural/local event, audience relevance, local dates, community guidance, approved offer, assets and trading arrangements.

Copyable prompt

Plan a [named event] campaign for [business/audience]. Research the event using reliable local sources and separate facts from creative suggestions. Explain why the campaign is relevant; flag stereotypes, insensitive imagery or assumptions. Draft an offer, email, SMS, banner and social assets with consistent terms. Provide a sensitivity and factual-review checklist. Do not infer a contact's religion or ethnicity from their name or location. Draft only. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Source-backed event brief; creative/copy pack; sensitivity and consent checklist. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional retailer prepares a local festival gift guide using relevant products, without labelling CRM contacts by inferred religion.

Review gate

Confirm local dates and community fit. Do not build sensitive audience segments from guesses.

116. Prepare a genuine closing-down sale

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Owner-confirmed closure facts/date, locations affected, stock, actual prices, outstanding orders/vouchers, support route and legal advice.

Copyable prompt

Prepare a closing-down sale and customer-care communications plan for [confirmed situation]. Clearly distinguish permanent closure, one-location closure and stock clearance. Draft sale assets, an existing-order update, voucher FAQ, staff response sheet and final contact/support notices. Use genuine pricing and explain any unresolved obligations for professional review. Never use closing-down language if the business is not actually closing. No publication, refunds or account changes. Include a short campaign vibe-line/tagline and explain its tone. For this specific event, define the eligible lead segment using recorded purpose and channel permission, then exclude opt-outs, duplicates, irrelevant purchasers and contacts over the frequency cap. Do not select all leads indiscriminately.

Expected output

Truthful sale pack; existing-customer care plan; obligations/issues register. Event tagline/vibe-line; eligible-lead selection and exclusion specification.

Fictional example

A fictional furniture shop is closing one branch only. Its banner names that branch and does not imply the whole company is closing.

Review gate

Closing does not erase customer rights or outstanding obligations. Obtain legal/accounting review for actual closure terms.

117. Audit CRM marketing eligibility

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Minimum necessary contact export with stable IDs, channel-specific consent evidence, suppression/bounce status, dates, source and retention rules.

Copyable prompt

Using [redacted/synthetic CRM table], classify each record as eligible, excluded or needs review for [specific campaign/channel/purpose]. Show the evidence and reason. Do not infer consent from a phone number, prior purchase or public listing alone. Keep unknowns out of the sendable segment. Produce proposed filters and a reconciliation count; do not export a send list or change records. Include tests for opted-out, missing consent, duplicate and wrong-purpose records.

Expected output

Eligibility rules; record-level reasons; reconciliation counts; test fixtures.

Fictional example

Four synthetic contacts: one has recorded SMS consent, one opted out, one has email-only consent and one has no evidence. Only the first is eligible for the proposed SMS campaign.

Review gate

Maintain evidence of consent and purpose. A technically valid number or an AI-selected lead is not permission to market.

118. Design CRM tags without losing consent history

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Current fields/tags, lifecycle definitions, owners, sample records, reporting needs and suppression policy.

Copyable prompt

Propose a tag and field schema for [business]. Separate lifecycle stage, product interest, event registration, acquisition source and channel consent. Keep consent evidence and withdrawal dates in auditable fields, not only a removable tag. Define naming rules, who may change each field, entry/exit criteria, duplicates, migration and rollback. Produce a dry-run mapping and exceptions report using [sample records]. Do not update the CRM.

Expected output

Data dictionary; tag schema; dry-run migration map; ownership and rollback plan.

Fictional example

A fictional showroom uses event:ev-preview for interest, not sms-consent. A person can be interested in EVs and still be excluded from SMS marketing.

Review gate

Never re-add marketing eligibility by bulk tagging. Suppression must override campaign-interest and lifecycle tags.

119. Specify an event registration automation

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Event ID/date/timezone, form fields, capacity, confirmation purpose, consent wording, sender identity, CRM/workflow access and cancellation policy.

Copyable prompt

Design a draft registration workflow in Xpress AI for [event], conditional on verified account features. Map form submission to deduplicated registration, event-interest tag, transactional confirmation, capacity/waitlist handling, reminder and staff task. Keep optional marketing consent separate. Show trigger, conditions, action, owner and failure route for each step. Include duplicate, full-capacity, cancellation, wrong-timezone and withdrawn-marketing-consent tests. Do not configure or send. A dedicated Events module may be beta and availability varies by account. Verify it first; include a QR/form-based registration fallback with manual capacity and check-in controls.

Expected output

Workflow specification; field map; confirmation/reminder drafts; edge-case tests.

Fictional example

A fictional product preview has 30 places. Duplicate submissions update one registration; the 31st person receives a waitlist draft, not a seat confirmation.

Review gate

Confirm features, plan and sender setup in the actual account. Event updates must not silently become a promotional sequence.

120. Build a suppression and frequency-control plan

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Channels, existing preference centre, suppression lists, campaign calendar, approved frequency cap and jurisdictions.

Copyable prompt

Prepare a channel-specific suppression and frequency-control specification for [business]. Include unsubscribe, do-not-contact, complaints, hard bounces, invalid numbers, deceased/incorrect contacts and pending consent review. Define precedence, cross-campaign checks, stop conditions and a staff override audit. Write test cases and draft preference-centre/opt-out language. In Australia, use the current ACMA requirements as a source, not a guessed time limit. Do not send test marketing or alter contacts.

Expected output

Suppression rulebook; frequency-cap logic; opt-out drafts; test and audit plan.

Fictional example

A fictional customer opts out between preview and reminder. The reminder eligibility check excludes them even though the campaign-interest tag remains.

Review gate

ACMA requires unsubscribe requests be honoured within five working days; design for faster suppression. A CRM workflow alone does not prove compliance.

121. Design a customer feedback survey

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Survey goal, service context, desired decision, maximum questions, minimum data fields, consent/privacy text and response window.

Copyable prompt

Create a short neutral survey for [customer group] to answer [decision]. Write up to six non-leading questions with suitable response types, one optional comment and an optional follow-up request. Provide form layout, accessible wording, field mapping, invitation and reminder drafts, non-response handling and a reporting plan. Do not ask for unnecessary sensitive details. Describe setup in Xpress AI only if the feature is verified; otherwise supply a build specification for an approved form tool. Draft only.

Expected output

Survey questionnaire; form/CRM map; invitations; reporting and setup brief.

Fictional example

A fictional service firm asks which appointment windows customers prefer before changing hours. It does not frame every question to endorse a preselected answer.

Review gate

State the purpose and privacy treatment. Do not make a favourable review the condition for resolving a complaint.

122. Turn survey responses into a service-improvement plan

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Redacted responses, question definitions, response counts, sampling window and known limitations.

Copyable prompt

Analyse [survey responses] without inventing missing data. Report counts and percentages with denominators, themes with anonymised quotes, contradictory feedback and non-response bias. Separate observation from interpretation. Suggest three testable service changes with owners and measures. Draft staff tasks and a customer thank-you/update for approval; never expose an identifiable response or infer sensitive traits. Do not change records or contact respondents.

Expected output

Response summary; limitations; prioritised experiments; draft tasks and update.

Fictional example

Nine of 15 respondents prefer Saturday. The report says nine of 15 respondents, not 60% of all customers, and notes that weekday-only customers may be underrepresented.

Review gate

Check arithmetic and re-identification risk. Small samples are signals for testing, not proof of population preference.

123. Design a video-testimonial collection journey

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Eligible customer group, actual completed work, consent/release terms, collection tool, storage/retention policy and approval owner.

Copyable prompt

Design a voluntary video-testimonial request journey for [business]. Provide invitation, recording instructions, open-ended questions, reminder and thank-you drafts. Include clear permission choices for collection, editing and specific publication channels, plus a withdrawal/contact process. Define storage access and retention. Never script a customer's opinion or require praise. State what collection, editing and publishing tools still need verification; do not send or collect anything.

Expected output

Request journey; recording guide; permission fields; storage and tool checklist.

Fictional example

A fictional kitchen installer asks customers to describe the process in their own words. The request accepts critical feedback and does not offer a reward for a positive rating.

Review gate

Consent to submit a video is not automatically consent to publish it everywhere. Check testimonial authenticity and applicable advertising rules.

124. Prepare a truthful testimonial edit

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Consented original video/transcript, approved usage channels, factual context, editing limits, captions and customer approval process.

Copyable prompt

Prepare an edit decision list for [testimonial]. Select faithful excerpts with source timestamps, preserve context, write accurate captions and note any factual claim needing evidence. Suggest a short version and a full version without changing the customer's meaning. Provide an approval preview script and release checklist. Do not remove a qualification that changes the endorsement, invent words, clone a voice or publish.

Expected output

Timestamped edit plan; captions; claim checks; customer/owner approval checklist.

Fictional example

A fictional client says installation was quick after a delayed delivery. The edit cannot cut the delay discussion in a way that implies the entire project was delay-free.

Review gate

Review the actual exported video against the original and permission record. AI edits are not self-verifying.

125. Prepare a social publishing queue with approval gates

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Approved content/assets, rights, accounts, channel permissions, dates/timezone, campaign terms and publishing-feature availability.

Copyable prompt

Create a publishing queue for [approved assets] with channel, copy, media, alt text, date/timezone, owner and approval status. Check account-specific Xpress AI publishing capability; if unavailable or undocumented, produce a manual-post handoff instead. Define preflight checks, token-expiry/failure alerts, duplicate prevention and a rollback/removal contact. No scheduling, posting or account changes. Label draft versus approved assets clearly.

Expected output

Publishing queue; capability checklist; manual fallback; failure/duplicate test plan.

Fictional example

A fictional store prepares five posts. Facebook is approved and connected but LinkedIn publishing is unverified, so the LinkedIn row stays manual and unscheduled.

Review gate

Product pages can conflict with library guidance. Confirm current access on the exact account, not from a generic platform claim.

126. Create an event QR registration system

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Approved HTTPS registration URL, event ID, poster/sign dimensions, venue conditions, attribution rules and fallback contact method.

Copyable prompt

Specify a QR registration journey for [event]. Use [verified destination] and explain static versus managed redirect choices, ownership and any ongoing cost. Provide QR generation instructions, poster copy, short human-readable fallback URL, accessibility notes and attribution fields. Define tests on multiple phones, printed size/distance, weak reception, expired event and redirect failure. Do not create a code pointing to an unverified destination or collect data without the form/privacy review.

Expected output

QR destination/ownership spec; sign copy; print and phone test checklist; fallback plan.

Fictional example

A fictional car launch has a printed QR plus a readable URL. If the redirect subscription ends, staff must still have a supported way to maintain or replace the sign.

Review gate

A QR code only opens a destination; it does not create the form, consent or CRM automation by itself.

127. Design post-service QR choices

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Service context, approved feedback/review/help URLs, accessibility needs, sender identity and customer-support process.

Copyable prompt

Create a post-service QR card that lets customers choose help, private feedback, booking or a public review. Write neutral copy and a simple destination-page layout. Do not route only happy customers to a review site or discourage critical reviews. Provide destination verification, print tests, privacy notes and reporting measures. Any discount or incentive must be flagged for policy/legal review, not assumed permitted. Draft only.

Expected output

Choice-page wireframe; QR card copy; destination and review-policy checks.

Fictional example

A fictional mechanic uses one card with equally visible help and feedback options. Every customer can access the same public review link regardless of their rating.

Review gate

Do not use review gating. Verify the review platform's current policies and avoid collecting account credentials.

128. Measure QR enquiries without over-tracking

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Campaign IDs, approved attribution fields, privacy notice, aggregate goals, retention period and analytics capabilities.

Copyable prompt

Design a privacy-conscious QR campaign report for [business]. Define scans, landing-page visits, submitted forms, eligible enquiries and bookings as different events. Explain attribution limits, duplicate visits and missing consent. Use aggregate data where possible and provide a fictional sample table with clearly labelled numbers. Propose a dashboard and QA checks; do not deploy tracking pixels or upload identifiers.

Expected output

Measurement plan; field dictionary; fictional dashboard; data-quality checks.

Fictional example

A fictional event records 200 scans and 24 registrations. The report does not call all scans leads, and does not claim 24 unique people until deduplication is checked.

Review gate

Attribution is incomplete. Check privacy and consent requirements before using cookies, pixels, cross-device IDs or advertising audiences.

129. Create an event-company campaign from end to end

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Confirmed venue/date/timezone, audience, capacity, ticket/registration terms, accessibility, cancellation plan, budget and consented channels.

Copyable prompt

Build a complete draft marketing and operations pack for [event]. Include concept, run sheet, brochure layout, banner, landing page, video script, carousel, social posts, launch email, reminder email, SMS options and attendee FAQ. Define CRM fields/tags, capacity/waitlist logic, opt-outs, no-show handling and post-event survey. Add staff ownership, approval gates and success measures. Do not send, book suppliers, spend or configure systems.

Expected output

End-to-end event pack; communications schedule; CRM/run-sheet specification; checks.

Fictional example

A fictional business-networking breakfast has a 60-person venue cap. Registration confirmation and unrelated sponsor promotions are separate purposes.

Review gate

Verify venue, rights, insurance and local event requirements. Sponsor access to attendee data needs its own lawful basis and clear consent where required.

130. Clean and tag an event database safely

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Minimum necessary attendee records with stable IDs, event history, consent source/purpose/channel, suppression and retention rules.

Copyable prompt

Prepare a dry-run cleanup of [event database]. Identify duplicates, invalid details, ambiguous identities, consent gaps and outdated event tags. Propose merges with confidence and source evidence, but never merge uncertain people automatically. Produce a before/after count, exception queue, field/tag map and reversible migration plan. Separate operational attendee lists from future marketing eligibility. Do not write to the CRM or contact anyone.

Expected output

Dedup report; eligibility separation; migration/rollback plan; exception queue.

Fictional example

Two fictional attendees share a surname and address but have different IDs and emails. The plan does not merge them just because they may be family.

Review gate

Never turn a historic attendee import into a consented marketing list. Review retention and deletion rules before keeping old records.

131. Launch a new-car preview event

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Verified model/specifications and launch status, dealership approval, vehicle availability, event details, capacity, prices/terms and consented segments.

Copyable prompt

Create a new-car preview campaign for [showroom/model]. Produce a brochure structure, verified-spec table, banner, video script, carousel, email/SMS invitation and follow-ups, registration page and staff FAQ. Use separate interest segments without inferring affordability or personal finances. Flag unknown price, range, delivery and finance facts; do not invent them. Include test-drive eligibility, CRM tags, opt-outs and approvals. No messaging, booking or financial recommendation.

Expected output

Full showroom launch pack; spec-source list; registration/CRM plan; review gates.

Fictional example

A fictional showroom has a display vehicle but no confirmed delivery date. Its copy invites a preview and does not promise immediate delivery.

Review gate

Check model/variant details and any range/finance claims against current approved sources. Qualified staff approve regulated or safety-sensitive material.

132. Invite past buyers to a relevant showroom offer

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Approved offer/terms, stock, service or purchase history, recorded channel consent, suppression, frequency caps and exclusions.

Copyable prompt

Using [synthetic/redacted records], design a permission-based past-buyer campaign for [offer/event]. Define eligible segments with transparent reasons, exclude opted-out/unverified contacts and avoid sensitive inferences. Draft distinct email/SMS paths for relevant owners, interested leads and already-booked people. Include stock/expiry checks, purchase exclusions, reply handling and a staff handoff. No list export, messages or record changes.

Expected output

Segment logic; tailored drafts; exclusion/test matrix; reply triage plan.

Fictional example

A fictional customer interested in electric vehicles can receive an approved EV-event draft only if the campaign purpose and channel consent fit. Interest alone is not consent.

Review gate

Recheck eligibility immediately before any approved send. Finance, trade-in and scarcity claims require current evidence and clear terms.

133. Plan a dealership community road trip

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Proposed route/venue, dates/timezone, vehicle/driver requirements, capacity, organizer responsibilities, insurance/legal guidance and consented audience.

Copyable prompt

Prepare a community road-trip event plan for [showroom/club]. Draft route-research questions, a safety/permissions checklist, itinerary, registration fields, brochure, banner, video script, social assets, email/SMS invitations and follow-ups. Clearly state whether it is a self-drive social event, not a supervised driving lesson. Include weather/cancellation and emergency communications, accessibility and privacy. Do not claim a route is safe, book venues, send or collect licence images.

Expected output

Community event pack; logistics/safety questions; communications; CRM and approval plan.

Fictional example

A fictional showroom proposes a local scenic drive with a café stop. The itinerary remains provisional until route, venue capacity and organizer obligations are checked.

Review gate

A qualified organizer verifies road rules, permits, insurance and safety. Never encourage speeding, convoy pressure or distracted driving.

134. Turn event attendance into consented next steps

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Actual attendance/no-show records, feedback, approved follow-up purposes, channel consent, suppression and sales-owner assignments.

Copyable prompt

Prepare a post-event follow-up plan for [event]. Separate attendees, no-shows, waitlisted people and those requesting a sales conversation. Draft a thank-you, resource email, optional survey and requested appointment response. Limit marketing paths to eligible contacts and stop after the approved sequence. Produce task handoffs and a report with registrations, attendance and qualified requests as separate metrics. Do not send or change lifecycle stages.

Expected output

Post-event paths and drafts; sales tasks; outcome report; stop rules.

Fictional example

A fictional attendee asks for a model brochure but declines promotional SMS. The plan fulfils the specific brochure request without adding them to the SMS campaign.

Review gate

Do not mistake attendance, scanning a badge or asking one question for unlimited ongoing marketing consent.

135. Create a premium property-tour campaign

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Verified property facts, owner/agent permissions, approved photos/floorplans, tour route, dates/timezone, capacity, access/safety and advertising rules.

Copyable prompt

Build a full draft campaign for a premium property or city-tour event in [location]. Create the itinerary, brochure layout/copy, banner, video script, carousel, social posts, invitation email, follow-up email and SMS options. Use only [verified property facts]; flag price, availability, travel time and investment claims needing current evidence. Include registration, qualification questions, CRM tags, opt-outs, accessibility, owner approvals and weather/withdrawn-listing alternatives. Do not book, send or publish.

Expected output

Complete property-tour marketing pack; facts register; itinerary and CRM/approval plan.

Fictional example

A fictional agent has permission to show three homes. If one owner withdraws, the plan removes it from every asset rather than advertising a tour that cannot happen.

Review gate

Check local real-estate rules, privacy and licence requirements. Do not promise returns, exclusivity or buying opportunities without evidence.

136. Qualify property-tour enquiries without sensitive profiling

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Objective tour eligibility, available appointment slots, approved qualification fields, consent/privacy wording and agent review rules.

Copyable prompt

Design a short property-tour enquiry form and follow-up decision tree for [event]. Ask only what is needed, such as preferred area, property type, timeframe and contact preference. Avoid protected characteristics, wealth guesses or unnecessary identity documents. Draft confirmations, waitlist and requested agent-call messages. Provide field mapping and synthetic tests for missing consent, full capacity and withdrawn property. Do not rank people by inferred ethnicity, family status or finances, and do not contact anyone.

Expected output

Form; transparent decision tree; drafts; field mapping and test cases.

Fictional example

A fictional buyer selects an area and timeframe. The system offers a relevant agent conversation rather than guessing purchasing power from their postcode.

Review gate

A qualified agent reviews suitability. Any regulated financial/identity checks require the proper process, not a general AI prompt.

137. Promote a parent-supervised childcare open day

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Confirmed venue/date/timezone, service approvals, age range, adult-supervision policy, capacity, staff ratios/legal guidance, activities and consent terms.

Copyable prompt

Create an end-to-end draft campaign for [childcare/daycare] running a community open day with [painting/phonics/maths activities]. Produce brochure, banner, registration page, social/carousel copy, video script, invitation email/SMS and follow-ups. Make adult attendance, supervision, availability and any fee explicit. Collect adult contact details and minimum child information only where needed. Separate marketing and photo consent. Include safeguarding, accessibility, waitlist and cancellation checklists. No publication or registration.

Expected output

Full community open-day pack; form/CRM map; safeguarding/approval checklist.

Fictional example

A fictional centre hosts a parent-attended painting morning. Copy says parents stay with children and does not imply that a free activity guarantees an enrolment place.

Review gate

Centre leadership verifies child-safety obligations, staff ratios, food/allergy plans, media permissions and approved educational claims.

138. Build a local learning-event series

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Confirmed activity leaders, age range, learning aims, venue/club permissions, dates, capacity, supervision, accessibility and registration terms.

Copyable prompt

Plan a three-session community series for [centre/club]: painting, phonics and maths, using [qualified leader input]. Produce a schedule, age-appropriate activity briefs, parent information, brochure, posters, social posts and email/SMS reminders. Include registration/waitlist, adult contact preferences and attendance fields; avoid public child profiles. Do not make developmental promises or present generated lessons as qualified advice. Draft only, with staff review before use.

Expected output

Series plan; parent pack; creative/copy assets; registration and safety review map.

Fictional example

A fictional club partners with a centre for parent-attended activities. Separate session capacities prevent an umbrella registration from overbooking each room.

Review gate

Educators approve content and suitability. Verify venue permissions, supervision and consent before inviting families.

139. Run a hospitality local-community event campaign

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Approved menu/prices, venue capacity, licences, dietary/allergen facts, confirmed entertainment, dates/timezone and consented audience.

Copyable prompt

Prepare a neighbourhood event campaign for [café/restaurant]. Produce concept, run sheet, menu/offer summary, poster/banner, video script, carousel, email/SMS invitations, reminders and post-event feedback survey. Include reservation capacity, cancellation terms, accessibility and dietary enquiry handling. Avoid unverified allergen-free or health claims. Add CRM segments, opt-outs and owner approval gates. No reservations, payments or publication.

Expected output

Hospitality event pack; capacity/booking logic; dietary and licence review checklist.

Fictional example

A fictional café plans a tasting evening. Allergen information is marked for kitchen confirmation, not generated from ingredient guesses.

Review gate

Verify food/alcohol/entertainment rules, prices and cancellation costs. A prompt is not a food-safety assessment.

140. Create a trade-business demonstration day

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Verified service/product facts, qualified presenters, venue permissions, demo hazards, date/capacity, approved offer and consented contacts.

Copyable prompt

Create a customer education/demo-day plan for [trade business]. Produce a practical agenda, brochure, banner, explainer-video script, social/carousel assets, email/SMS invitations and follow-ups. Explain the service without unsafe DIY instructions or invented savings. Include demonstration safety, accessibility, CRM tags, opt-outs, booking enquiries and a staff handoff. No sending, worksite changes or supplier commitments.

Expected output

Trade demo-day pack; safety questions; enquiry workflow and approvals.

Fictional example

A fictional solar installer explains how to prepare questions for a quote. Savings estimates require actual site/usage evidence and qualified review.

Review gate

Licensed staff review technical claims and demonstrations. Do not present general examples as engineering or safety certification.

141. Define a Black Monday campaign without inventing an event

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Owner definition of Black Monday, actual date/timezone, approved offer, audience, stock, terms and consented channels.

Copyable prompt

Clarify what [business] means by Black Monday: a named local campaign, a follow-on sale or another event. Do not assume it is a standard holiday or confuse it with Cyber Monday. Using [approved facts], draft an event brief, brochure, banner, social/carousel plan, video script, email and SMS sequence. Make dates and exclusions consistent, prevent duplicate reminders to Cyber Monday buyers and include suppression and stock stop-rules. No sending or publishing.

Expected output

Defined campaign brief; complete asset pack; overlap/suppression rules.

Fictional example

A fictional retailer calls its own Monday clearance Black Monday. Every asset states the actual date and that it is the retailer's campaign, not an official holiday.

Review gate

Owner confirms event meaning and date. Avoid false holiday claims and repeated messages across overlapping promotions.

142. Test special-offer value before discounting

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Actual prices, variable costs, fulfilment capacity, cancellation/refund costs, objective and budget ceiling.

Copyable prompt

Compare [discount], [bundle] and [value-added service] for [business] using only the supplied cost inputs. Show unit contribution, capacity demand and break-even assumptions; label unknowns. Draft an offer card and copy for each with clear exclusions. Propose a small human-approved test with a control, success measure and stop condition. Do not invent uplift, choose a winner without evidence, spend or publish.

Expected output

Offer-economics comparison; draft offer cards; experiment plan.

Fictional example

A fictional salon compares a price discount with an off-peak add-on. The calculation includes staff time, rather than treating an add-on as free.

Review gate

Confirm arithmetic and all costs. Do not treat a forecast conversion lift as measured performance.

143. Prepare a fitness community workshop campaign

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Qualified instructor input, suitability limits, venue/date/capacity, actual fees, accessibility, safety and approved claims.

Copyable prompt

Build a draft community workshop campaign for [fitness business]. Produce agenda, brochure, banner, video script, social/carousel assets, invitation email/SMS and follow-ups. Include parent/adult supervision where relevant, opt-outs, registration and requested consultation paths. Avoid medical, weight-loss or injury-prevention guarantees; health screening belongs with qualified staff and approved secure processes. No bookings, messages or publication.

Expected output

Workshop campaign pack; registration/CRM plan; qualified-review checklist.

Fictional example

A fictional gym invites locals to a beginner introduction. Copy describes the session, not promised weight loss or treatment outcomes.

Review gate

Qualified staff assess safety, suitability and professional claims. Do not collect health histories in social comments or a general AI chat.

144. Create a professional-services educational event

DRAFT / PROPOSED WORKFLOW. Verify feature and account access before implementation.

Inputs to supply

Professional-approved content, audience, topic boundaries, venue/date/timezone, capacity, fees, consent and disclaimer.

Copyable prompt

Prepare a draft seminar or webinar campaign for [professional service]. Produce a learning outline, brochure, banner, video invitation, carousel, social posts, email/SMS sequence, registration form and post-event resource email. Clearly separate general education from personal advice. Include speaker approval, source checks, accessibility, CRM segmentation and opt-outs. No regulated recommendations, inferred sensitive audience profiling, sends or publication.

Expected output

Seminar marketing/education pack; approval map; follow-up and CRM specification.

Fictional example

A fictional accounting firm explains records to prepare before an appointment. Its campaign does not promise a tax outcome or advise a named attendee.

Review gate

Licensed professionals approve content and local advertising obligations. Resource requests do not create unlimited marketing consent.

WORKED CAMPAIGNS + 60 NEW BUSINESS PROMPTS

From a brief to the actual words.

This section deepens the earlier campaign material into six complete fictional worked packs, six additional industry adaptations and 60 new operational prompts numbered 145-204. The original 96 vendor-library prompts and 48 authored campaign prompts remain intact. There are now 204 numbered entries, including 108 authored prompts; none of the authored material is presented as a verified vendor command.

Every worked business, figure and scenario is invented for teaching. Dates, prices, addresses, staff approval, access, permissions and URLs in square brackets must be resolved before use. No real case-study result, industry test, automated send, account change or deployment is claimed. Drafts need fact, technical, professional and owner review appropriate to the work.

How to use the packs

Read one complete scenario. Replace only the fields you can substantiate. Run its master prompt in an approved assistant using synthetic or appropriately protected inputs. Compare the output to the worked pack, then use the review and test gates. Drafting text is distinct from building forms, connecting accounts, sending, spending or publishing.

New navigation

Childcare: Little Lantern Learning Together

Automotive: Harbour Motors Coast and Coffee

Property: Meridian Neighbourhood and Home Tour

Event company: Riverside Local Makers Evening

Retail: Black Friday to Boxing Day without message overload

Launch and anniversary: a practical local-business campaign

Industry adaptations: extra childcare sessions, hospitality, trades, fitness, accounting and professional services. New prompts: accounting; hiring; processes; market/product research; platform-safe opportunities; jobs/knowledge/controls.

FICTIONAL WORKED CAMPAIGN

Childcare: Little Lantern Learning Together

Copyable campaign master prompt

Act as a campaign planner and copywriter, not as an operator authorised to send or spend. Build a complete draft campaign for this brief: Little Lantern Early Learning is a fictional centre planning a parent/carer-attended Saturday discovery morning, 9:30-11:30, for 12 family groups. Its qualified staff will approve age suitability, activity design, safeguarding, staffing and materials before promotion. This is not a drop-off childcare service. The goal is useful parent connection and optional requests for centre information, not a promised enrolment total. Date, address, cost, staffing and registration URL remain approval placeholders. Use the following programme and restrictions: 09:30 welcome and private adult check-in; 09:40 parent-and-child painting table; 10:05 playful sound-and-story circle approved by the educator; 10:25 break and handwashing; 10:40 everyday counting and sorting; 11:00 optional parent questions about future sessions; 11:20 feedback and take-home activity sheet; 11:30 close. A parent/carer remains with each child throughout. Staff set safe material choices and age limits. Children can participate without promotional photography. No diagnostic assessment or guaranteed literacy gain is offered. Return: 1 a fact/unknowns sheet and objective; 2 brand voice, visual guidance and prohibited claims; 3 website copy and FAQs; 4 complete landing page, form fields and separate preference choices; 5 brochure panels and banner; 6 a 30-second video script, shot list and image brief; 7 five carousel cards and social copy; 8 invitation email/SMS, confirmation, waitlist, reminder, change/cancellation, attendee/non-attendee follow-ups and staff replies; 9 CRM field/tag and channel-eligibility specification, suppression and frequency cap; 10 normal/error/opt-out tests, approvals and measurement. Preserve placeholders for unresolved facts. Do not invent credentials, results, prices, consent, live product capabilities or deployment. Explain which build tasks need account verification or an external specialist. All assets must use one fact sheet and tested final URL.

The fictional brief and objective

Little Lantern Early Learning is a fictional centre planning a parent/carer-attended Saturday discovery morning, 9:30-11:30, for 12 family groups. Its qualified staff will approve age suitability, activity design, safeguarding, staffing and materials before promotion. This is not a drop-off childcare service. The goal is useful parent connection and optional requests for centre information, not a promised enrolment total. Date, address, cost, staffing and registration URL remain approval placeholders.

Event-day plan and responsibilities

09:30 welcome and private adult check-in; 09:40 parent-and-child painting table; 10:05 playful sound-and-story circle approved by the educator; 10:25 break and handwashing; 10:40 everyday counting and sorting; 11:00 optional parent questions about future sessions; 11:20 feedback and take-home activity sheet; 11:30 close. A parent/carer remains with each child throughout. Staff set safe material choices and age limits. Children can participate without promotional photography. No diagnostic assessment or guaranteed literacy gain is offered.

Draft campaign brand-style sheet

Voice: warm, clear and respectful of parents, without school-readiness pressure. Suggested campaign colours: warm cream, deep teal and a small coral accent; verify accessible contrast in the actual artwork. Use large readable type, illustrations of materials and rights-cleared staff images. Never imply a photographed child attends this centre without permission. Consistent CTA: See the session details and register. Avoid best start, guaranteed reading or limited places unless capacity actually supports it.

Draft website module and FAQs

Home hero: Learn, make and connect together. Intro: Explore a relaxed morning of painting, stories and everyday counting with your child and our educators. This community session gives families a chance to enjoy simple activities together and ask questions about future learning events. Sections: What happens / Who can attend / Parent supervision / Practical information / Questions / Register. Website FAQ: Is this a childcare booking? No. A parent or carer must stay and supervise their child. Can I attend without photos? Ask the team about the no-photo route; promotional permission is separate. Are extra classes included? No. Future classes, availability and any fees will be explained separately.

Draft landing page and registration

Headline: A morning to paint, play with sounds and explore numbers. Subheading: A parent/carer-attended community session at Little Lantern. Body: Join our educators for short, age-appropriate activities designed for adults and children to enjoy together. Your registration is for this event only. Date/time: [verified date], 9:30-11:30 [timezone]. Venue/access: [approved details]. Price: [approved price/free terms]. Capacity: 12 family groups, subject to final staffing approval. Form: adult name, contact, number of adults/children and necessary access request. Do not request a child profile, developmental history or full birth date by default. Separate optional choices: send future session information; ask the centre to contact me about enrolment; contact me about an access request. Unchecked choices must not prevent event registration.

Draft brochure panels and banner

Front: Learning Together at Little Lantern. Inside panel 1: Paint and create with everyday materials. Panel 2: Enjoy an educator-led sound-and-story circle. Panel 3: Try simple counting and sorting together. Practical panel: [date/time], [venue], parent/carer attendance required, [approved age range], [cost], [materials/access]. Back: Register at [tested short URL] or scan [tested QR]. Questions: [centre contact]. Future classes and centre enrolment are optional, separate enquiries. This brochure makes no promise of a learning outcome.

Draft video script and production brief

30-second script: 0-5s, close-up of prepared paintbrushes and paper, voice: A little time to learn and make together. 5-12s, educator demonstrates the approved activity with an adult stand-in, voice: Join Little Lantern for painting, stories and everyday counting. 12-20s, empty prepared story area and counting materials, voice: Short activities, useful ideas and time for your questions. 20-26s, staff invitation: Parents and carers stay and take part. 26-30s, event card with [date/time/venue], Register at [URL]. Caption all speech. Do not use identifiable child footage without the required permissions.

Draft image, carousel and social copy

Hero image brief: overhead view of approved painting/counting materials on a clean table, room for headline, no identifiable children. Banner: Learning Together | [date] | Parent/carer-attended | Register [URL/QR]. Five-card carousel: 1 Make a little time together. 2 Paint and create. 3 Stories, sounds and everyday numbers. 4 Parents/carers stay throughout. 5 Details and registration at [URL]. Social caption: Looking for a simple way to spend a morning learning and creating with your child? Our Learning Together community session includes educator-approved activities and time for parent questions. [Date/time/venue/cost]. Read the supervision and age details before registering: [URL].

Draft invitation email

Subject: Join our Learning Together community morning. Hi [adult first name], you asked to hear about our family learning events. On [verified date], Little Lantern is hosting a parent/carer-attended morning of painting, stories and everyday counting. The session runs 9:30-11:30 [timezone] at [venue]. Please read the age, supervision, materials and cost details at [URL] before registering. Registration is for the event only; future classes or enrolment enquiries are optional. Questions? Contact [centre contact]. [Sender identity/address where required]. [Unsubscribe route].

Draft SMS and event-service messages

Invitation, only to eligible adult contacts: Little Lantern: Learning Together morning [date], 9:30-11:30 [timezone]. Parent/carer attends throughout. Details/cost/register: [URL]. [Supported opt-out]. Confirmation: Your family group is registered for Learning Together on [date]. Please read supervision and arrival details: [URL]. Changes: [contact/change route]. Reminder: Your Learning Together session is tomorrow at [time/venue]. Bring [staff-approved items]. A parent/carer must remain. Need to change? [route]. Cancellation: Learning Together on [date] is cancelled because [approved factual reason]. [Refund/reschedule facts]. Contact [team]. Do not add a sales offer to these event-service messages.

Draft follow-up, feedback and response pack

Attendee email: Thanks for joining Learning Together. Here is the activity sheet you requested: [resource]. We would welcome one idea about what worked or what to change: [survey]. If you want future-session or enrolment information, choose that separately at [preference link]. Non-attendee: Sorry we missed you. If you still want the resource you requested, it is here: [link]. No need to explain why you could not attend. Testimonial request, separately eligible and optional: Would you be willing to share an honest comment about the session? [permission process]. Staff reply to an enrolment enquiry: Thank you. [Named staff member] can explain actual availability, fees and suitability. We cannot promise a place from event attendance.

Audience, CRM, permissions and workflow

Campaign DEMO-CHILD-01. Tags: interest:family-session, event:registered, event:attended, followup:enrolment-requested. Keep these separate from email/SMS consent and photo permission. Adult-only marketing audience: documented relevant permission, minus opt-outs, complaints, duplicates, recent invitation cap and already-registered contacts where an invitation would be redundant. Service messages use the event purpose and applicable channel rules. Retain only necessary event data under the centre policy. Never tag a child as behind in phonics, high-value family or likely to enrol.

Worked measurement example

Synthetic exercise: 18 adult registrations submitted, 2 duplicates rejected, 4 placed on waitlist and 12 family groups confirmed. Ten groups attended and two cancelled. Three adults separately requested centre information; that is three enquiries, not three enrolments. If illustrative campaign spend is $120, cost per confirmed group is $10 and per attending group is $12. These invented figures demonstrate denominators, not expected performance. Include staff/material costs before any profitability conclusion.

Preflight and test matrix

Owner verifies facts, audience, budget, rights and actual sender. Administrator verifies supported form/CRM/message features, access and channel mechanics. Designer/editor checks actual pixels/audio/captions. Qualified staff verify safety/advice limits. Test: eligible adult follows normal path; duplicate is not double-counted; opted-out contact never enters marketing; missing permission is held; already registered person is not reinvited; sold-out state becomes waitlist; cancellation updates all affected records; failed write creates an exception; retry does not duplicate; withdrawal during a queued sequence stops affected marketing. Keep a manual fallback and inspect downstream records, not a success toast. No ready-to-launch claim without this evidence.

FICTIONAL WORKED CAMPAIGN

Automotive: Harbour Motors Coast and Coffee

Copyable campaign master prompt

Act as a campaign planner and copywriter, not as an operator authorised to send or spend. Build a complete draft campaign for this brief: Harbour Motors is a fictional showroom organising a community road outing for 15 vehicles. It is not a speed event, vehicle performance test or sales-pressure convoy. A qualified organiser must approve route, stops, permissions, emergency plan, insurance position and weather decision before invitations. Drivers remain independently responsible for lawful driving. No vehicle allocation, test drive, finance approval or insurance cover is promised. Offer facts, dates, costs and venue details are placeholders until approved. Use the following programme and restrictions: 08:30 private check-in and vehicle count at [approved meeting place]; 08:45 organiser briefing; 09:00 staggered departures using the verified route, not a requirement to stay together; 09:45 authorised stop with safe parking; 10:15 optional showroom/model conversation using approved manufacturer facts; 10:45 coffee stop at a venue with confirmed capacity; 11:30 finish and optional feedback. No filming while driving. A person checks road closures/weather and may cancel. Give participants the support number and agreed incident procedure, not other attendees private contact details. Return: 1 a fact/unknowns sheet and objective; 2 brand voice, visual guidance and prohibited claims; 3 website copy and FAQs; 4 complete landing page, form fields and separate preference choices; 5 brochure panels and banner; 6 a 30-second video script, shot list and image brief; 7 five carousel cards and social copy; 8 invitation email/SMS, confirmation, waitlist, reminder, change/cancellation, attendee/non-attendee follow-ups and staff replies; 9 CRM field/tag and channel-eligibility specification, suppression and frequency cap; 10 normal/error/opt-out tests, approvals and measurement. Preserve placeholders for unresolved facts. Do not invent credentials, results, prices, consent, live product capabilities or deployment. Explain which build tasks need account verification or an external specialist. All assets must use one fact sheet and tested final URL.

The fictional brief and objective

Harbour Motors is a fictional showroom organising a community road outing for 15 vehicles. It is not a speed event, vehicle performance test or sales-pressure convoy. A qualified organiser must approve route, stops, permissions, emergency plan, insurance position and weather decision before invitations. Drivers remain independently responsible

for lawful driving. No vehicle allocation, test drive, finance approval or insurance cover is promised. Offer facts, dates, costs and venue details are placeholders until approved.

Event-day plan and responsibilities

08:30 private check-in and vehicle count at [approved meeting place]; 08:45 organiser briefing; 09:00 staggered departures using the verified route, not a requirement to stay together; 09:45 authorised stop with safe parking; 10:15 optional showroom/model conversation using approved manufacturer facts; 10:45 coffee stop at a venue with confirmed capacity; 11:30 finish and optional feedback. No filming while driving. A person checks road closures/weather and may cancel. Give participants the support number and agreed incident procedure, not other attendees private contact details.

Draft campaign brand-style sheet

Voice: welcoming, calm and community-focused. Suggested design: charcoal, off-white and a restrained orange accent, high-contrast type. Use licensed vehicle and location photos; avoid dangerous-speed imagery, public-road racing language or unsupported environmental claims. Repeat CTA: Read the route and participation details. A model-preview version may use approved manufacturer branding only within its guidelines. Do not create a manufacturer endorsement.

Draft website module and FAQs

Home module: Meet the community beyond the showroom. Body: Coast and Coffee is a small, organised outing for people who enjoy cars and conversation. Read the route, costs and participation conditions before registering. Sections: Route overview / Stops / Driver responsibilities / Weather changes / Accessibility / Register. FAQ: Is this a test drive? No; any separate test drive requires the showroom process. Must I buy a car? No. Is insurance included? Do not state that it is; direct the participant to the approved terms and their insurer where needed. Can I bring a passenger? Only within the registered capacity and event conditions.

Draft landing page and registration

Headline: Coast and Coffee, at your own pace. Subheading: A community road outing with Harbour Motors. Overview: Enjoy a verified route, planned stops and time to meet other local drivers. No racing, convoy pressure or purchase requirement. [Date/time/timezone], [meeting point], [route summary], [actual costs], [participation conditions]. Registration asks adult driver contact, vehicle/place count and necessary access request; do not collect licence copies in a general marketing form. Separate optional choices for future events, a model brochure or a showroom call. Registering does not create future-marketing permission or a test-drive booking.

Draft brochure panels and banner

Front: Coast and Coffee. Panel 1: Where we meet and finish. Panel 2: Planned stops and approximate times, subject to approved conditions. Panel 3: What participants are responsible for. Panel 4: What to bring and how weather decisions work. Back: Costs, capacity, participation terms, tested registration URL/QR and organiser contact. Use a clear map only after verifying the actual route; decorative lines are not navigation instructions. Include text alternative to QR.

Draft video script and production brief

30-second script: 0-5s, parked vehicle detail at an authorised site, voice: Good cars. Good conversation. A considered route. 5-12s, static shots of approved stops, voice: Join Harbour Motors for Coast and Coffee. 12-20s, staff presenter: Read the route, costs and participation details before registering. 20-26s, parked group scene only with permissions, voice: This is a community outing, not a race or a test drive. 26-30s event card with [date/URL]. No moving-driver phone footage, implied road closure or unsafe positioning.

Draft image, carousel and social copy

Image brief: parked vehicles at approved venue with no number plates/personal details unless permission supports them. Banner: Coast and Coffee | [date] | Read route and terms [URL]. Carousel: 1 A road outing with room for conversation. 2 The approved route at a glance. 3 Planned stops and access. 4 Your responsibilities and weather plan. 5 Register after reading the details. Social caption: We are planning a small community outing with verified stops and time to talk cars. No purchase required. Read route, costs and participation terms at [URL]. Never present an unapproved route/date as confirmed.

Draft invitation email

Subject: Coast and Coffee: route and registration details. Hi [first name], you asked about our community driving events. Harbour Motors is planning Coast and Coffee on [approved date/time]. You can read the route, stops, actual costs and participation conditions here: [URL]. Drivers travel independently and must follow road rules; this is not a race or a test drive. Registration is limited by the verified capacity, not vehicle sales targets. Questions: [organiser]. [Business sender details]. [Unsubscribe]. A past vehicle purchase alone is not authority to send this invitation.

Draft SMS and event-service messages

Invitation: Harbour Motors: Coast and Coffee outing [date]. Read route/costs/terms before registering: [URL]. No purchase required. [Supported opt-out]. Confirmation: Your Coast and Coffee place for [vehicle/place count] is confirmed. Meet [point/time]. Participation pack/change route: [URL]. Reminder: Please check the latest route/weather notice before

leaving for Coast and Coffee [date]: [URL]. Do not read messages while driving. Cancellation: Coast and Coffee [date] is cancelled following [approved condition]. Do not travel to the meeting point. [Refund/reschedule facts]. [Contact].

Draft follow-up, feedback and response pack

Attendee: Thanks for joining Coast and Coffee. The permission-cleared recap and requested resources are here: [URL]. If you asked for a brochure or showroom conversation, the named team member will follow up separately. Feedback: What worked, and what should change? [survey]. Non-attendee: Sorry we missed you. Here are the event resources you requested, without implying attendance. Model enquiry reply: Here is the approved [model] material. Availability and final drive-away terms must be checked by our team; no finance or delivery assurance is made. Future-event invitations only follow the actual preference chosen.

Audience, CRM, permissions and workflow

Campaign DEMO-AUTO-01. Separate vehicle count, registration state, attendance, requested:model-brochure, requested:showroom-call and optional future-event permission. Eligibility is relevant, documented channel/purpose permission minus suppression/duplicates/frequency caps. Past buyers interested in a different model are not automatically relevant. Staff manually reconcile waitlist promotions and cancellations. Do not expose all participant emails in a group message or share a public attendee sheet.

Worked measurement example

Synthetic exercise: 22 registrations represent 17 vehicles; two duplicate vehicle entries leave 15 confirmed vehicles. Thirteen attend. Six adults request a model brochure; two ask for a showroom call. These are requests, not six vehicle leads meeting a sales definition or two purchases. Track actual sales later through verified attribution with an agreed window. If illustrative event costs are $390, cost per attending vehicle is $30. Include staff and any venue/subsidy cost; no revenue is invented.

Preflight and test matrix

Owner verifies facts, audience, budget, rights and actual sender. Administrator verifies supported form/CRM/message features, access and channel mechanics. Designer/editor checks actual pixels/audio/captions. Qualified staff verify safety/advice limits. Test: eligible adult follows normal path; duplicate is not double-counted; opted-out contact never enters marketing; missing permission is held; already registered person is not reinvited; sold-out state becomes waitlist; cancellation updates all affected records; failed write creates an exception; retry does not duplicate; withdrawal during a queued sequence stops affected marketing. Keep a manual fallback and inspect downstream records, not a success toast. No ready-to-launch claim without this evidence.

FICTIONAL WORKED CAMPAIGN

Property: Meridian Neighbourhood and Home Tour

Copyable campaign master prompt

Act as a campaign planner and copywriter, not as an operator authorised to send or spend. Build a complete draft campaign for this brief: Fictional Meridian Property plans a four-hour guided tour for eight adult registrants across two approved homes and one neighbourhood stop. A licensed agent verifies every property description, viewing permission, transport arrangement, advertising statement and cost. No capital-growth, rental-return, finance or property-reservation promise. Private addresses are given only through the approved registered-attendee route. Use the following programme and restrictions: 09:00 private check-in at the approved meeting place; 09:15 neighbourhood orientation; 10:00 home one; 10:45 transfer/break; 11:15 home two; 12:00 questions and requested resources; 13:00 finish. Reconfirm vendor access before departure. Provide accessible alternatives and a cancellation/contact route. Attendees may decline photography. Do not leave buyers unaccompanied or imply exclusive access that has not been granted. Return: 1 a fact/unknowns sheet and objective; 2 brand voice, visual guidance and prohibited claims; 3 website copy and FAQs; 4 complete landing page, form fields and separate preference choices; 5 brochure panels and banner; 6 a 30-second video script, shot list and image brief; 7 five carousel cards and social copy; 8 invitation email/SMS, confirmation, waitlist, reminder, change/cancellation, attendee/non-attendee follow-ups and staff replies; 9 CRM field/tag and channel-eligibility specification, suppression and frequency cap; 10 normal/error/opt-out tests, approvals and measurement. Preserve placeholders for unresolved facts. Do not invent credentials, results, prices, consent, live product capabilities or deployment. Explain which build tasks need account verification or an external specialist. All assets must use one fact sheet and tested final URL.

The fictional brief and objective

Fictional Meridian Property plans a four-hour guided tour for eight adult registrants across two approved homes and one neighbourhood stop. A licensed agent verifies every property description, viewing permission, transport arrangement, advertising statement and cost. No capital-growth, rental-return, finance or property-reservation promise. Private addresses are given only through the approved registered-attendee route.

Event-day plan and responsibilities

09:00 private check-in at the approved meeting place; 09:15 neighbourhood orientation; 10:00 home one; 10:45 transfer/break; 11:15 home two; 12:00 questions and requested resources; 13:00 finish. Reconfirm vendor access before departure. Provide accessible alternatives and a cancellation/contact route. Attendees may decline photography. Do not leave buyers unaccompanied or imply exclusive access that has not been granted.

Draft campaign brand-style sheet

Discreet, factual, calm. Suggested palette: ivory, dark navy and muted bronze; readable type and licensed, current listing photos. No luxury/lifestyle imagery suggesting amenities not included. CTA: Request the verified itinerary. Distinguish area commentary from listing facts; date the source sheet.

Draft website module and FAQs

Home hero: Explore the neighbourhood, then inspect the details. Body: A small guided tour of approved properties and local context, led by our licensed team. Compare practical features, ask questions and request material about homes that interest you. Modules: Tour approach / Current approved listings / Access and transport / Questions / Register. FAQ: Does a place reserve a property? No. Is this investment advice? No. Can access change? Yes; the team will notify registered attendees of confirmed changes.

Draft landing page and registration

Headline: A considered look at [approved area]. Details: [date/time/timezone], two approved viewings, [transport/cost], eight adult places subject to access confirmation. Form: adult contact, preferred property type, optional relevant budget band, accessibility/contact request and attendance count. Do not infer wealth or sensitive traits. Separate checkbox for the agent to discuss a nominated property; separate future-marketing preference. CTA: Register interest in the tour. Confirmation follows actual access and capacity checks, not an automatic reservation.

Draft brochure panels and banner

Front: The Meridian viewing route. Inside: verified area overview; listing-one factual highlights; listing-two factual highlights; transport/access/cost; conditions and contact. Use current approved floorplans and captions. Back: Request itinerary [URL/QR]. Do not publish private vendor information or unapproved internal photos. Banner: Guided property tour | [date] | Verified itinerary on request.

Draft video script and production brief

0-5s authorised area shot; 5-12s approved listing-one detail; 12-19s listing-two detail; 19-25s agent: We will explain the facts and help you ask the right questions; 25-30s date/itinerary

CTA. Do not digitally improve a property condition or insert views/amenities not present. Caption any simulated visual clearly rather than implying actual listing footage.

Draft image, carousel and social copy

Carousel: 1 Explore with a plan. 2 Compare verified practical features. 3 Understand access and transport. 4 Ask the licensed agent. 5 Request the itinerary. Social: Our next small-group tour brings together approved viewings and useful neighbourhood context. Access, costs and listings can change; read the current details before registering [URL]. No investment-return language.

Draft invitation email

Subject: Your invitation to the Meridian property tour. Hi [name], you asked about [relevant area/type]. Our team is arranging approved viewings on [date/time]. Read the current access, transport and cost details at [URL]. Places are confirmed only after the access/capacity checks. Attendance does not reserve a home. [Agent/business identity, contact and unsubscribe].

Draft SMS and event-service messages

Invite: Meridian: requested tour details for [area/date]: [URL]. Access conditions apply. [Opt-out]. Confirmation: Your [count] place(s) on the tour are confirmed. Meeting point and access pack [private route]. Change [contact]. Reminder: Please check the latest itinerary before travelling [URL]. Change notice: Viewing [reference] is unavailable; [approved alternative/refund/change route]. No private address in public posts.

Draft follow-up, feedback and response pack

Attendee: Thanks for joining. You asked about [listing/resource]; here is the licensed-agent-approved material. Would you like [agent] to contact you about that request? Non-attendee: The approved material you requested is available here; no attendance assumption. Survey: Which practical information was useful? What should improve? Testimonial request only under a separate permission process; no quote editing that removes qualifications.

Audience, CRM, permissions and workflow

DEMO-PROP-01. Tags interest:area, event:confirmed, event:attended, followup:listing-requested. Keep permissions, listing-owner restrictions and contact access separate. No sensitive profiling from names, photographs or locations. Suppress withdrawn/irrelevant contacts and reconcile duplicates before invitations.

Worked measurement example

Synthetic: eight confirmed places, six attendees, three listing-information requests and one licensed-agent conversation. Not four sales. If supplied total event cost is $240, cost per attendee is $40; no return calculation without actual revenue and attribution.

Preflight and test matrix

Owner verifies facts, audience, budget, rights and actual sender. Administrator verifies supported form/CRM/message features, access and channel mechanics. Designer/editor checks actual pixels/audio/captions. Qualified staff verify safety/advice limits. Test: eligible adult follows normal path; duplicate is not double-counted; opted-out contact never enters marketing; missing permission is held; already registered person is not reinvited; sold-out state becomes waitlist; cancellation updates all affected records; failed write creates an exception; retry does not duplicate; withdrawal during a queued sequence stops affected marketing. Keep a manual fallback and inspect downstream records, not a success toast. No ready-to-launch claim without this evidence.

FICTIONAL WORKED CAMPAIGN

Event company: Riverside Local Makers Evening

Copyable campaign master prompt

Act as a campaign planner and copywriter, not as an operator authorised to send or spend. Build a complete draft campaign for this brief: Fictional Riverside Events plans an adult community showcase with six confirmed local makers and 40 visitor places. Venue, permits, accessibility, vendor contracts, insurance, refunds and emergency responsibilities must be signed off before publicity. No speaker or vendor may be announced while unconfirmed. Use the following programme and restrictions: 16:00 vendor setup and safety checks; 17:30 staff briefing; 18:00 adult check-in; 18:15 welcome and wayfinding; 18:30 demonstrations; 19:15 optional networking; 19:45 feedback and last information requests; 20:00 close; 20:30 reconciliation. Name owners for entry/capacity, incidents, accessibility, vendor support, refunds and communications. Return: 1 a fact/unknowns sheet and objective; 2 brand voice, visual guidance and prohibited claims; 3 website copy and FAQs; 4 complete landing page, form fields and separate preference choices; 5 brochure panels and banner; 6 a 30-second video script, shot list and image brief; 7 five carousel cards and social copy; 8 invitation email/SMS, confirmation, waitlist, reminder, change/cancellation, attendee/non-attendee follow-ups and staff replies; 9 CRM field/tag and channel-eligibility specification, suppression and frequency cap; 10 normal/error/opt-out tests, approvals and measurement. Preserve placeholders for unresolved facts. Do not invent credentials, results, prices, consent, live product capabilities or deployment. Explain which build tasks need account verification or an external specialist. All assets must use one fact sheet and tested final URL.

The fictional brief and objective

Fictional Riverside Events plans an adult community showcase with six confirmed local makers and 40 visitor places. Venue, permits, accessibility, vendor contracts, insurance, refunds and emergency responsibilities must be signed off before publicity. No speaker or vendor may be announced while unconfirmed.

Event-day plan and responsibilities

16:00 vendor setup and safety checks; 17:30 staff briefing; 18:00 adult check-in; 18:15 welcome and wayfinding; 18:30 demonstrations; 19:15 optional networking; 19:45 feedback and last information requests; 20:00 close; 20:30 reconciliation. Name owners for entry/capacity, incidents, accessibility, vendor support, refunds and communications.

Draft campaign brand-style sheet

Friendly local professionalism. Cream/navy with an orange accent, readable signs, actual maker images with rights. CTA: Explore the programme and register. Avoid largest, exclusive or award-winning without evidence. Each vendor approves its own facts; the event company does not invent product claims.

Draft website module and FAQs

Hero: Meet the makers behind the work. Body: Explore demonstrations from six confirmed local businesses, ask practical questions and discover how their products are made. Sections: Confirmed makers / Programme / Access and entry / Conditions / Contact. FAQ: Are purchases required? No. Is entry refundable? State the actual policy and applicable rights, not a placeholder promise.

Draft landing page and registration

Headline: A local evening of ideas, craft and conversation. [Date/time/venue], confirmed programme, actual price/fees/refund conditions, access contact. Adult registration: name, email, attendance count; only necessary optional access information through a restricted route. Separate future-event permission. Sold-out state: Join the waitlist, not Register now. Waitlist is not a confirmed ticket.

Draft brochure panels and banner

Front: Riverside Local Makers Evening. Inside: six approved maker summaries; programme; how demonstrations work; access/parking; price and conditions. Back: tested URL/QR and support contact. Banner: Meet local makers | [date] | Programme and entry [URL]. Staff FAQ includes sold-out, access, refunds, weather and vendor changes.

Draft video script and production brief

0-5s licensed close-ups of maker work; 5-15s three short maker introductions; 15-22s venue/access preview; 22-27s presenter: See the programme and choose what interests you; 27-30s date/URL. Never imply unconfirmed talent appears. Obtain music, speaker and artwork permissions.

Draft image, carousel and social copy

Carousel: 1 Meet the makers. 2 Watch an approved demonstration. 3 Ask a useful question. 4 Know the entry and access details. 5 Register at [URL]. Caption: Our confirmed programme is ready. Read maker details, entry terms and access information before booking. [URL]. A change after approval pauses every affected asset.

Draft invitation email

Subject: The Riverside makers programme is ready. Hi [name], you asked about local-business events. Join [confirmed event/date/time]. See the six makers, access information, actual entry price and refund conditions at [URL]. Choose your place only after reading the terms. [Sender/contact/unsubscribe].

Draft SMS and event-service messages

Invite: Riverside Events: makers evening [date]. Programme/entry terms [URL]. [Opt-out]. Confirmation: [Booking reference], [count] places confirmed, [date/time]. Arrival/access/change details [URL]. Waitlist: You are on the waitlist, not confirmed; we will contact you if a place opens. Change/cancel: [Actual decision] for [event/date]. [Approved refund/reschedule route].

Draft follow-up, feedback and response pack

Thanks for attending. Here are the maker links you requested [URL]. Feedback is welcome at [survey]. Each maker receives only the contact requests and disclosures covered by permission, not the complete visitor list. Non-attendees receive only a requested resource/appropriate service follow-up, not a false thanks-for-coming message.

Audience, CRM, permissions and workflow

DEMO-EVENT-01. Separate staff/vendors/confirmed/waitlist/cancelled/attended and future-marketing eligibility. Capacity promotion must remove the person from waitlist and create one confirmed record; test duplicates and failed notifications. Staffed list fallback if the provider cannot support reliable ticketing.

Worked measurement example

Synthetic: 48 registration attempts, 3 duplicates, 40 confirmations and 5 waitlisted. Thirty-four attend. Eleven request maker information; do not treat this as eleven sales. Reconcile refunds, vendor costs, fees and actual permissioned referrals before assessing value.

Preflight and test matrix

Owner verifies facts, audience, budget, rights and actual sender. Administrator verifies supported form/CRM/message features, access and channel mechanics. Designer/editor checks actual pixels/audio/captions. Qualified staff verify safety/advice limits. Test: eligible adult follows normal path; duplicate is not double-counted; opted-out contact never enters marketing; missing permission is held; already registered person is not reinvited; sold-out state becomes waitlist; cancellation updates all affected records; failed write creates an exception; retry does not duplicate; withdrawal during a queued sequence stops affected marketing. Keep a manual fallback and inspect downstream records, not a success toast. No ready-to-launch claim without this evidence.

FICTIONAL WORKED CAMPAIGN

Retail: Black Friday to Boxing Day without message overload

Copyable campaign master prompt

Act as a campaign planner and copywriter, not as an operator authorised to send or spend. Build a complete draft campaign for this brief: Fictional Lumen Home has 12 display lamps with disclosed marks and an approved clearance window. The example combines Black Friday/Cyber Monday planning and a separate Australian Boxing Day check, not an assumed continuous sale. A person supplies year-specific dates, stock, price evidence, item condition, shipping, returns and total fulfilment costs. Black Monday is only a separately defined business campaign if explicitly chosen. Use the following programme and restrictions: Planning: verify each SKU, condition photo, actual prior price evidence and capacity. Preview: eligible audience sees factual item details. Opening: publish current stock/terms. Reminder: only eligible non-buyers below frequency cap. Close: stop when actual stock/window ends. Boxing Day: independently recheck remaining stock and policy; never recycle a sold-out item or reset a false deadline. Return: 1 a fact/unknowns sheet and objective; 2 brand voice, visual guidance and prohibited claims; 3 website copy and FAQs; 4 complete landing page, form fields and separate preference choices; 5 brochure panels and banner; 6 a 30-second video script, shot list and image brief; 7 five carousel cards and social copy; 8 invitation email/SMS, confirmation, waitlist, reminder, change/cancellation, attendee/non-attendee follow-ups and staff replies; 9 CRM field/tag and channel-eligibility specification, suppression and frequency cap; 10 normal/error/opt-out tests, approvals and measurement. Preserve placeholders for unresolved facts. Do not invent credentials, results, prices, consent, live product capabilities or deployment. Explain which build tasks need account verification or an external specialist. All assets must use one fact sheet and tested final URL.

The fictional brief and objective

Fictional Lumen Home has 12 display lamps with disclosed marks and an approved clearance window. The example combines Black Friday/Cyber Monday planning and a separate Australian Boxing Day check, not an assumed continuous sale. A person supplies year-specific dates, stock, price evidence, item condition, shipping, returns and total fulfilment costs. Black Monday is only a separately defined business campaign if explicitly chosen.

Event-day plan and responsibilities

Planning: verify each SKU, condition photo, actual prior price evidence and capacity. Preview: eligible audience sees factual item details. Opening: publish current stock/terms. Reminder: only eligible non-buyers below frequency cap. Close: stop when actual stock/window ends. Boxing Day: independently recheck remaining stock and policy; never recycle a sold-out item or reset a false deadline.

Draft campaign brand-style sheet

Clear product-led typography, navy/cream and a modest orange offer label. Show real condition rather than hiding defects. CTA: See each lamp and its condition. No fake countdown, inflated comparison price, every item must go or closing-down claim unless true. Cyber Monday digital offers require real access/recurring/refund terms.

Draft website module and FAQs

Hero: Display lamps, clearly described. Body: See the exact item, marks, current price and delivery options before deciding. Sections: Live item list / Condition photos / Delivery and collection / Returns and rights / Help. FAQ: Are display marks shown? Yes, each listing must disclose them. Does clearance remove consumer rights? Do not state that; get current qualified policy review.

Draft landing page and registration

Headline: Twelve display lamps, item-by-item details. Grid fields: item ID, actual image, condition, current price, evidence-backed comparison only if approved, stock, delivery/collection, terms. CTA: View this item. Do not collect marketing permission as a purchase requirement. Sold-out cards say sold out. Enquiry form captures only item/contact/request; any future-marketing choice separate.

Draft brochure panels and banner

Front: Lumen display-lamp clearance. Inside: item IDs/photos/condition/current prices; actual dates; collection/shipping and support. Back: current inventory URL/QR, terms and sender contact. Print stock may lag; tell readers to check live availability. Banner: Display clearance | Condition disclosed | Current items [URL].

Draft video script and production brief

0-5s show exact display lamp; 5-15s slow close-up of disclosed marks; 15-22s price and practical dimensions from approved sheet; 22-27s collection/delivery options; 27-30s current-stock URL. No smoothing away damage or digitally changing colour. Captions repeat material conditions.

Draft image, carousel and social copy

Carousel: 1 A clear look at display stock. 2 Actual item photos. 3 Condition before price. 4 Collection/delivery and terms. 5 Check current availability. Social: These display lamps have item-specific marks and prices. See all photos and current stock before buying [URL]. Do not claim a saving without genuine reference-price evidence.

Draft invitation email

Subject: Display lamps with condition and prices listed. Hi [name], you opted to hear about homewares offers. Our approved display clearance runs [dates], while the actual listed items remain available. Each lamp has its own condition photos, price and fulfilment details. Check current availability and terms here [URL]. [Business/contact/unsubscribe].

Draft SMS and event-service messages

Invite: Lumen Home: display-lamp clearance details, condition and current stock [URL]. [Opt-out]. Reminder only where eligible: Still considering a lamp? Current items/terms [URL]. Do not send if purchased/opted out/cap reached. Order messages use verified merchant order state, not campaign assumptions. Change: Item [ID] is unavailable; [approved order-specific support/refund route].

Draft follow-up, feedback and response pack

Buyer service reply: Thank you. Your actual order confirmation and fulfilment details come from the merchant record. Non-buyer: do not imply abandonment unless the relevant data and permission support it. Feedback request: Was the item information clear? No positive-review reward or filtering. Pause overlapping Black Friday/Cyber Monday/Boxing Day sends after purchase where irrelevant.

Audience, CRM, permissions and workflow

DEMO-RETAIL-01. Separate interest:item, purchased:item and permission evidence. Eligibility excludes opt-outs/complaints/duplicates, irrelevant buyers, frequency-cap breaches and missing evidence. Stock checks occur before scheduling and again before dispatch; owner confirms supported account mechanics.

Worked measurement example

Synthetic economics: supplied price $80, variable item/fulfilment cost $50, contribution $30 before campaign costs. Eight sales contribute $240; supplied campaign cost $120 leaves $120 before fixed overhead, tax and other omitted costs. This is teaching arithmetic, not a measured result or proposed real price.

Preflight and test matrix

Owner verifies facts, audience, budget, rights and actual sender. Administrator verifies supported form/CRM/message features, access and channel mechanics. Designer/editor checks actual pixels/audio/captions. Qualified staff verify safety/advice limits. Test: eligible adult follows normal path; duplicate is not double-counted; opted-out contact never enters marketing; missing permission is held; already registered person is not reinvited; sold-out state becomes waitlist; cancellation updates all affected records; failed write creates an exception; retry does not duplicate; withdrawal during a queued sequence stops affected marketing. Keep a manual fallback and inspect downstream records, not a success toast. No ready-to-launch claim without this evidence.

FICTIONAL WORKED CAMPAIGN

Launch and anniversary: a practical local-business campaign

Copyable campaign master prompt

Act as a campaign planner and copywriter, not as an operator authorised to send or spend. Build a complete draft campaign for this brief: Fictional Harbour Bike Care is opening a workshop and planning an adult-attended demonstration for 20 people. A later anniversary adaptation uses only the verified founding date and licensed archive material. No invented customer numbers, awards or milestones. A qualified mechanic approves all demonstration claims and safety boundaries. Use the following programme and restrictions: 14:00 staff safety and capacity check; 14:30 welcome/check-in; 14:40 owner introduction; 14:50 qualified mechanic demonstrates one approved visual check; 15:15 questions; 15:30 optional requested service information and feedback; 16:00 close. This is education, not a free repair or safety certificate. Anniversary version adds a factual timeline and staff stories with permission, without changing the attendance/consent controls. Return: 1 a fact/unknowns sheet and objective; 2 brand voice, visual guidance and prohibited claims; 3 website copy and FAQs; 4 complete landing page, form fields and separate preference choices; 5 brochure panels and banner; 6 a 30-second video script, shot list and image brief; 7 five carousel cards and social copy; 8 invitation email/SMS, confirmation, waitlist, reminder, change/cancellation, attendee/non-attendee follow-ups and staff replies; 9 CRM field/tag and channel-eligibility specification, suppression and frequency cap; 10 normal/error/opt-out tests, approvals and measurement. Preserve placeholders for unresolved facts. Do not invent credentials, results, prices, consent, live product capabilities or deployment. Explain which build tasks need account verification or an external specialist. All assets must use one fact sheet and tested final URL.

The fictional brief and objective

Fictional Harbour Bike Care is opening a workshop and planning an adult-attended demonstration for 20 people. A later anniversary adaptation uses only the verified founding date and licensed archive material. No invented customer numbers, awards or milestones. A qualified mechanic approves all demonstration claims and safety boundaries.

Event-day plan and responsibilities

14:00 staff safety and capacity check; 14:30 welcome/check-in; 14:40 owner introduction; 14:50 qualified mechanic demonstrates one approved visual check; 15:15 questions; 15:30 optional requested service information and feedback; 16:00 close. This is education, not a

free repair or safety certificate. Anniversary version adds a factual timeline and staff stories with permission, without changing the attendance/consent controls.

Draft campaign brand-style sheet

Helpful, practical, unpretentious. Deep navy/cream with orange highlights; close-up tool imagery and permitted staff portraits. CTA: Meet the workshop and see the demonstration. Avoid safest, best, award-winning or years-of-service claims without evidence. Brand sheet includes logo clear space, approved colours, one heading/body type pair, image rights, tone examples and prohibited claims.

Draft website module and FAQs

Home hero: Practical bike care, explained clearly. Body: Meet Harbour Bike Care and discover how our workshop approaches [verified services]. Our opening demonstration introduces the team and one useful check you can discuss with a qualified mechanic. Sections: Services / Workshop approach / Meet the team / Opening event / FAQs / Contact. FAQ: Is the demonstration a repair booking? No. Can staff inspect my bike? Only through the actual workshop process, with agreed scope and price.

Draft landing page and registration

Headline: Meet the workshop. Learn one useful bike-care check. [Date/time/timezone], [address/access], [cost/free terms], 20 adult places subject to final approval. Explain the exact activity, safety conditions and cancellation route. Form: adult contact, place count and necessary access request. Separate optional service enquiry and future-event permission. Confirmation only after supported registration/capacity checks.

Draft brochure panels and banner

Front: Welcome to Harbour Bike Care. Inside: verified services; team introduction; demonstration outline; date/access/cost; registration. Back: actual contact and tested QR/short URL. Anniversary variation: [verified year] to [current year], factual timeline, permission-cleared staff/customer quotations, no fabricated longevity claim. Banner: Meet the workshop | [date] | Demonstration details [URL].

Draft video script and production brief

Opening film: 0-5s exterior; 5-12s qualified mechanic and tools; 12-20s approved visual-check demonstration; 20-26s owner invitation; 26-30s date/URL. Anniversary film: verified archive image, real milestone caption, staff memory in their own approved words, current workshop and invitation. Do not invent archive footage, customer praise or performance figures. Storyboard and captions require human approval before editing.

Draft image, carousel and social copy

Five-card carousel: 1 Meet Harbour Bike Care. 2 The verified services we offer. 3 The people behind the workshop. 4 What happens at the demonstration. 5 Date/details/register. Image brief: authentic workshop and licensed staff shot, no fake customer testimonial. Social: We are opening our doors for a practical introduction to the workshop. Read the demonstration scope and conditions, then register [URL]. Anniversary variation celebrates verified history rather than a made-up achievement.

Draft invitation email

Subject: Meet Harbour Bike Care at our opening demonstration. Hi [name], you asked about [relevant local event/service]. Join our adult-attended demonstration on [date/time] at [venue]. We will introduce the team and show [approved activity]. It is not a repair booking or certification. Details and registration [URL]. [Sender/contact/unsubscribe]. Anniversary subject: Marking [verified number] years of Harbour Bike Care, with a factual, permission-cleared story.

Draft SMS and event-service messages

Invite: Harbour Bike Care: opening demonstration [date/time]. Scope/conditions/register [URL]. [Opt-out]. Confirmation: Your [count] place(s) are recorded for [event]. Arrival/access/change route [URL]. Reminder: Your session is [date/time]; please check what to bring [URL]. Cancellation: [Event/date] cancelled. [Approved next step]. Contact [team].

Draft follow-up, feedback and response pack

Attendee: Thanks for meeting the workshop. Here is the resource you requested [link]. If you asked about a service, [staff] can discuss scope and actual pricing separately. Non-attendee: Here is your requested resource; no false attendance claim. Survey: What was useful? What could improve? Testimonial: optional honest comment with separate publication permission, no positive-review condition.

Audience, CRM, permissions and workflow

DEMO-LAUNCH-02. Separate event attendance, service enquiry, future-event permission and testimonial/portrait approval. Suppress opt-outs/duplicates and cap overlapping launch/anniversary messages. Every asset points to the same approved fact sheet/version.

Worked measurement example

Synthetic: 20 confirmed, 16 attend, 5 request a service discussion, 2 later receive quotes. No sale is assumed. Record actual bookings/revenue separately; include production/staff cost and opt-outs when evaluating the campaign.

Preflight and test matrix

Owner verifies facts, audience, budget, rights and actual sender. Administrator verifies supported form/CRM/message features, access and channel mechanics. Designer/editor checks actual pixels/audio/captions. Qualified staff verify safety/advice limits. Test: eligible adult follows normal path; duplicate is not double-counted; opted-out contact never enters marketing; missing permission is held; already registered person is not reinvited; sold-out state becomes waitlist; cancellation updates all affected records; failed write creates an exception; retry does not duplicate; withdrawal during a queued sequence stops affected marketing. Keep a manual fallback and inspect downstream records, not a success toast. No ready-to-launch claim without this evidence.

SIX FURTHER ADAPTATIONS

Keep the method. Change the facts.

Childcare extra classes and family fun evening

Use Little Lantern as the base. For a recurring phonics or maths series, name each staff-approved session and actual fees separately; do not imply guaranteed progress. For an evening, recheck lighting, parking, staffing, toilets, safe pickup and supervision. Draft invitation: Join our parent/carer-attended family activity evening on [date/time]. See age, supervision and access details before registering [URL]. Follow-up: Here is the activity resource you requested; choose future classes separately. No child profiling or enrolment-pressure sequence.

Copyable adaptation prompt

Adapt the relevant complete worked pack above for Childcare extra classes and family fun evening. Use this brief: Use Little Lantern as the base. For a recurring phonics or maths series, name each staff-approved session and actual fees separately; do not imply guaranteed progress. For an evening, recheck lighting, parking, staffing, toilets, safe pickup and supervision. Draft invitation: Join our parent/carer-attended family activity evening on [date/time]. See age, supervision and access details before registering [URL]. Follow-up: Here is the activity resource you requested; choose future classes separately. No child profiling or enrolment-pressure sequence. Write the actual brochure, website/landing sections, video/carousel, invitation email/SMS, confirmation/reminder/cancellation, attendee/non-attendee follow-up and staff FAQ. Change the substance, not just the business name. State required qualified review, permission and product/account checks; leave unknown facts in brackets. Include an audience eligibility rule, opt-out tests and measurement denominators.

Hospitality community tasting

Fictional Cedar Kitchen invites 16 adults to a guided tasting. Qualified staff approve ingredients, allergens, food safety and actual price. Landing: Meet the kitchen through a small guided tasting. Email: Read the menu, allergen contact process and price before reserving [URL]. SMS confirmation repeats time/access/change route. Video shows actual dishes, no fabricated health claims. Survey asks about experience, not medical history. Test allergen enquiry handling through a restricted staff route, sold-out/waitlist and refunds.

Copyable adaptation prompt

Adapt the relevant complete worked pack above for Hospitality community tasting. Use this brief: Fictional Cedar Kitchen invites 16 adults to a guided tasting. Qualified staff approve

ingredients, allergens, food safety and actual price. Landing: Meet the kitchen through a small guided tasting. Email: Read the menu, allergen contact process and price before reserving [URL]. SMS confirmation repeats time/access/change route. Video shows actual dishes, no fabricated health claims. Survey asks about experience, not medical history. Test allergen enquiry handling through a restricted staff route, sold-out/waitlist and refunds. Write the actual brochure, website/landing sections, video/carousel, invitation email/SMS, confirmation/reminder/cancellation, attendee/non-attendee follow-up and staff FAQ. Change the substance, not just the business name. State required qualified review, permission and product/account checks; leave unknown facts in brackets. Include an audience eligibility rule, opt-out tests and measurement denominators.

Trade-business demonstration

Fictional Northline Electrical runs an adult information morning, not DIY training in regulated work. Headline: Understand your maintenance questions before booking a professional. Qualified licensed staff approve script and demonstration. Brochure includes scope, safety boundaries, staff credentials verified from source, venue and conditions. Follow-up offers requested general resources and a separately authorised service conversation. Never encourage participants to perform electrical work or claim the event certifies competence.

Copyable adaptation prompt

Adapt the relevant complete worked pack above for Trade-business demonstration. Use this brief: Fictional Northline Electrical runs an adult information morning, not DIY training in regulated work. Headline: Understand your maintenance questions before booking a professional. Qualified licensed staff approve script and demonstration. Brochure includes scope, safety boundaries, staff credentials verified from source, venue and conditions. Follow-up offers requested general resources and a separately authorised service conversation. Never encourage participants to perform electrical work or claim the event certifies competence. Write the actual brochure, website/landing sections, video/carousel, invitation email/SMS, confirmation/reminder/cancellation, attendee/non-attendee follow-up and staff FAQ. Change the substance, not just the business name. State required qualified review, permission and product/account checks; leave unknown facts in brackets. Include an audience eligibility rule, opt-out tests and measurement denominators.

Fitness community workshop

Fictional Harbour Movement plans a beginner workshop with a qualified instructor. No weight-loss, health-recovery or suitability guarantee. Landing: Explore beginner movement options with an instructor. Form avoids public health histories; a qualified staff process handles necessary private suitability questions. Confirmation states actual accessibility,

what to bring and change route. Follow-up offers the requested routine only after instructor approval, not a personalised medical programme.

Copyable adaptation prompt

Adapt the relevant complete worked pack above for Fitness community workshop. Use this brief: Fictional Harbour Movement plans a beginner workshop with a qualified instructor. No weight-loss, health-recovery or suitability guarantee. Landing: Explore beginner movement options with an instructor. Form avoids public health histories; a qualified staff process handles necessary private suitability questions. Confirmation states actual accessibility, what to bring and change route. Follow-up offers the requested routine only after instructor approval, not a personalised medical programme. Write the actual brochure, website/landing sections, video/carousel, invitation email/SMS, confirmation/reminder/cancellation, attendee/non-attendee follow-up and staff FAQ. Change the substance, not just the business name. State required qualified review, permission and product/account checks; leave unknown facts in brackets. Include an audience eligibility rule, opt-out tests and measurement denominators.

Accounting educational seminar

Fictional Ledger Lane plans a general small-business records workshop. Headline: Bring better questions to your accountant. Programme covers organising records, invoice evidence and questions for a qualified adviser, not personalised tax advice. Email: Join our general records session [date]; do not send tax IDs, payroll exports or private returns through registration. Follow-up supplies the checklist requested; individual advice needs an appropriate professional engagement.

Copyable adaptation prompt

Adapt the relevant complete worked pack above for Accounting educational seminar. Use this brief: Fictional Ledger Lane plans a general small-business records workshop. Headline: Bring better questions to your accountant. Programme covers organising records, invoice evidence and questions for a qualified adviser, not personalised tax advice. Email: Join our general records session [date]; do not send tax IDs, payroll exports or private returns through registration. Follow-up supplies the checklist requested; individual advice needs an appropriate professional engagement. Write the actual brochure, website/landing sections, video/carousel, invitation email/SMS, confirmation/reminder/cancellation, attendee/non-attendee follow-up and staff FAQ. Change the substance, not just the business name. State required qualified review, permission and product/account checks; leave unknown facts in brackets. Include an audience eligibility rule, opt-out tests and measurement denominators.

Professional-services launch

Fictional Westbank Advisory runs a general information session. Verify entity, licences and permissible service claims. Draft invitation states educational scope and that attendance creates no adviser/client relationship. Landing separates registration from a private consultation request. No personal case histories in public comments/forms. Case examples use synthetic facts and clearly say they are not individual advice.

Copyable adaptation prompt

Adapt the relevant complete worked pack above for Professional-services launch. Use this brief: Fictional Westbank Advisory runs a general information session. Verify entity, licences and permissible service claims. Draft invitation states educational scope and that attendance creates no adviser/client relationship. Landing separates registration from a private consultation request. No personal case histories in public comments/forms. Case examples use synthetic facts and clearly say they are not individual advice. Write the actual brochure, website/landing sections, video/carousel, invitation email/SMS, confirmation/reminder/cancellation, attendee/non-attendee follow-up and staff FAQ. Change the substance, not just the business name. State required qualified review, permission and product/account checks; leave unknown facts in brackets. Include an audience eligibility rule, opt-out tests and measurement denominators.

PROMPTS 145-204

60 distinct operational business prompts.

These are copyable authored prompts with specific jobs, inputs, outputs and review gates. They can be used for controlled drafting and analysis with a suitable approved assistant. They are not claims that Xpress AI has native bank, payroll, recruitment, scraping, CRM-write or platform-monitoring access. Use permitted source material, not passwords or private exports pasted into an unapproved service. Where live tools are absent, supply a redacted or synthetic input and retain the missing operational check.

A platform-safe opportunity workflow

Start from a permitted listing, native alert or approved API. Record source ID, URL, observed time, request, geography, deadline, fee/contact restriction and owner. Qualify before drafting. An alert does not confer contact rights; a public post does not grant permission to scrape members or send unsolicited DMs. Paid unlocks and submission terms need separate approval. No bypass of login, private groups, paywalls or platform limits. Stop on access challenges or rate restrictions and use an allowed manual route.

Current-source boundaries checked 29 October 2026

Bark: the Australian terms distinguish customer/professional services; current credits/contact mechanics must be checked in the actual account before responding. This book gives no fixed credit price or unlock authority. hipages: published trade terms and the actual package/recorded agreement govern fees, lead access and account use; the cited written version is effective 1 April 2024 and is not proof of a reader account contract. Meta says automated collection without permission violates its terms. None of these sources establishes a universal scraping API or native Xpress integration. Sources: https://www.bark.com/en/au/terms/ ; https://help.bark.com/hc/en-us/articles/13346288068892-What-is-a-credit-and-how-much-does-it-cost ; https://hipages.com.au/content/trade_terms_conditions_240401 ; https://www.meta.com/actions/privacy-progress/ . Recheck current local/account terms before implementation.

ACCOUNTING AND FINANCE OPERATIONS

145. Reconcile a bank-export sample

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

synthetic bank rows, ledger rows, date window, currency, matching rules. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Match bank and ledger entries by evidence, flag partial and duplicate matches, and produce an unmatched-items queue. Never force a balance or silently create a journal. Inputs: [synthetic bank rows, ledger rows, date window, currency, matching rules]. Return matched-pair table, variance reasons, unresolved queue. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

matched-pair table, variance reasons, unresolved queue. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Accountant reviews matching and source documents before ledger changes. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

146. Check an invoice before approval

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

invoice text with private identifiers removed, purchase order, delivery evidence, approval policy. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare supplier, quantities, rates, tax presentation and payment terms against the approved purchase order and receipt. Flag duplicate invoice patterns and changed bank details without validating them from the invoice itself. Inputs: [invoice text with private identifiers removed, purchase order, delivery evidence, approval policy]. Return three-way comparison, exceptions, proposed approval questions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

three-way comparison, exceptions, proposed approval questions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Independently verify payment details through an established trusted route; no payment authority. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

147. Draft a receivables reminder ladder

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved invoice state, due dates, disputed items, relationship notes, reminder policy. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Prepare separate first reminder, overdue reminder and disputed-invoice acknowledgement. Use only verified balances and dates, exclude paid/disputed items from collection pressure, and show proposed recipients for review. Inputs: [approved invoice state, due dates, disputed items, relationship notes, reminder policy]. Return three email drafts, eligibility table, escalation owner. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

three email drafts, eligibility table, escalation owner. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Read live invoice/payment state before any send; no collection/legal threat invented. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

148. Build a thirteen-week cash view

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

opening cash, approved expected receipts/payments, timing confidence, currency. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Build weekly opening/closing cash scenarios with separate committed, likely and uncertain flows. Show assumptions, timing sensitivity and gaps; do not treat sales pipeline as cash. Inputs: [opening cash, approved expected receipts/payments, timing confidence, currency]. Return 13-week table, downside/base scenarios, missing inputs. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

13-week table, downside/base scenarios, missing inputs. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Finance owner verifies formulas and source values; forecasts are not guarantees. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

149. Find expense-policy exceptions

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

synthetic expense rows, policy, approval limits, receipt availability. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Classify each expense against the supplied policy and produce exception questions, not allegations. Separate missing evidence from confirmed non-compliance. Inputs: [synthetic expense rows, policy, approval limits, receipt availability]. Return exception register, receipt requests, reviewer queue. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

exception register, receipt requests, reviewer queue. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Human reviews evidence; no employee accusation or payroll deduction. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

150. Prepare an accountant handover

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

redacted document index, reporting period, chart of accounts, unresolved questions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Organise a period-end handover by bank, sales, purchases, payroll and open issues. Reconcile document counts and list missing evidence without inventing tax treatment. Inputs: [redacted document index, reporting period, chart of accounts, unresolved questions]. Return handover index, completeness checks, questions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

handover index, completeness checks, questions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Qualified accountant decides treatment and filing; no returns submitted. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

151. Explain budget versus actual

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved budget, actual ledger extracts, mapping, period and currency. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Calculate variances using the supplied mapping. Separate price, volume and timing hypotheses from verified causes, and prepare questions for budget owners. Inputs: [approved budget, actual ledger extracts, mapping, period and currency]. Return variance table, evidence-backed explanation, hypotheses. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

variance table, evidence-backed explanation, hypotheses. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Recalculate formulas and confirm causes; do not imply a variance proves poor performance. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

152. Compare supplier payment terms

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

current contracts/quotes, approved quantities, discounts, fees, cash assumptions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare total cash timing and actual costs under each supplied supplier term. Show early-payment discount conditions and missing fees without assuming credit approval. Inputs: [current contracts/quotes, approved quantities, discounts, fees, cash assumptions]. Return comparison, cash timeline, negotiation questions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

comparison, cash timeline, negotiation questions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Procurement/finance approval before commitments or changed payment schedule. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

153. Model a service offer contribution

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved price, labour assumptions, variable costs, platform fees, refund allowance. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Calculate unit contribution for three scope options, show break-even under stated assumptions, and expose omitted costs. Do not call contribution net profit. Inputs: [approved price, labour assumptions, variable costs, platform fees, refund allowance]. Return formula table, sensitivity analysis, scope tradeoffs. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

formula table, sensitivity analysis, scope tradeoffs. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Owner validates costs, currency/tax and capacity; no price publication. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

ACCOUNTING AND FINANCE OPERATIONS

154. Create an invoice-query triage

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

redacted customer queries, live-status snapshot, responsible teams, response policy. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Sort queries into missing invoice, amount dispute, payment proof and bank-detail concern. Draft a response and owner task for each without altering balances. Inputs: [redacted customer queries, live-status snapshot, responsible teams, response policy]. Return triage queue, reply drafts, evidence needed. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

triage queue, reply drafts, evidence needed. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Verify current state and identity before disclosing invoice details. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

155. Turn role needs into a scorecard

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

job tasks, essential qualifications, location/work terms, approved salary range. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Create a job-related role scorecard separating required from trainable skills. Remove demographic proxies and unsupported personality requirements. Inputs: [job tasks, essential qualifications, location/work terms, approved salary range]. Return criteria, evidence rubric, interview plan. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

criteria, evidence rubric, interview plan. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

HR/legal review of local employment and discrimination requirements. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

156. Draft a transparent job advertisement

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved scorecard, employment type, pay facts, work location, application route. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Write an accurate job ad with responsibilities, essential criteria, actual work terms and accessible application instructions. Flag missing salary/legal wording rather than invent it. Inputs: [approved scorecard, employment type, pay facts, work location, application route]. Return job ad, short post, fact gaps. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

job ad, short post, fact gaps. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Employer approves terms; no publishing or recruitment fee authority. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

157. Build a lawful talent-source plan

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

role scorecard, approved public sources, access permissions, recruiting region. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Suggest job boards, professional directories and opt-in channels appropriate to this role. Use permitted public/authorised information; do not scrape private profiles or infer protected traits. Inputs: [role scorecard, approved public sources, access permissions, recruiting region]. Return source plan, query strings, permission checks. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

source plan, query strings, permission checks. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Confirm source terms/access and data minimisation before collection. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

158. Compare candidate evidence fairly

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

consented redacted applications, job scorecard, reviewer instructions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Map each application to job criteria with quoted evidence and explicit unknowns. Do not rank on name, age, photo, ethnicity, health or inferred family circumstances. Inputs: [consented redacted applications, job scorecard, reviewer instructions]. Return evidence matrix, missing questions, reviewer notes. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

evidence matrix, missing questions, reviewer notes. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Human makes hiring decisions; no automated rejection or invented qualifications. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

159. Draft an interview question set

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

role scorecard, interview length, accommodation process. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Prepare structured job-related questions, the same core questions for each candidate and a consistent evidence rubric. Include a way to request accommodation privately. Inputs: [role scorecard, interview length, accommodation process]. Return question plan, scoring anchors, notes template. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

question plan, scoring anchors, notes template. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

HR approves questions and lawful process; no personal sensitive probing. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

160. Design a paid work-sample exercise

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

role tasks, approved compensation, time limit, synthetic material, assessment rubric. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Create a proportionate sample using fictional data, not unpaid client production. State time, payment, ownership and assessment method for employer review. Inputs: [role tasks, approved compensation, time limit, synthetic material, assessment rubric]. Return candidate brief, synthetic inputs, marking guide. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

candidate brief, synthetic inputs, marking guide. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Approve pay/legal terms before invitation; no real customer data. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

161. Draft a permission-based candidate invitation

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

candidate-approved channel, role facts, prior interest, reviewer identity. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Draft a concise invitation explaining why the role may fit, actual terms and an easy decline. Do not imply an application or consent that does not exist. Inputs: [candidate-approved channel, role facts, prior interest, reviewer identity]. Return message draft, fact checklist, decline handling. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

message draft, fact checklist, decline handling. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Recipient/channel/words approved before send; opt-out honoured. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

162. Prepare reference-check questions

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

candidate permission, verified referee route, role criteria, local policy. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Create job-related reference questions and an evidence record that separates statements from conclusions. Do not contact referees or retrieve unrelated personal data. Inputs: [candidate permission, verified referee route, role criteria, local policy]. Return questions, consent checklist, evidence notes. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

questions, consent checklist, evidence notes. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

HR verifies consent and referee identity; no covert checks. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

163. Build a new-hire thirty-day plan

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved role, manager, systems/access policy, training schedule. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Draft first-week and thirty-day milestones, buddy support and access requests by role. Separate requested access from granted access and require owners. Inputs: [approved role, manager, systems/access policy, training schedule]. Return onboarding schedule, access request list, check-ins. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

onboarding schedule, access request list, check-ins. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Manager/security approves access; no account creation or secret sharing. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

HIRING AND TALENT RESEARCH

164. Analyse recruiting funnel bottlenecks

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

anonymised stage counts, dates, source costs, definitions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Calculate stage conversion and delay, show small-sample limits, and propose job-related process experiments without inferring candidate demographics. Inputs: [anonymised stage counts, dates, source costs, definitions]. Return funnel table, timing analysis, experiment plan. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

funnel table, timing analysis, experiment plan. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Validate denominators and privacy; no discriminatory targeting. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

165. Write an SOP from observed steps

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved process notes, owner, current tools, exceptions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Turn the observed process into numbered steps with inputs, outputs, responsibility and exception paths. Label unverified steps rather than inventing system actions. Inputs: [approved process notes, owner, current tools, exceptions]. Return SOP, decision points, open questions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

SOP, decision points, open questions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Process owner demonstrates steps before adoption. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

166. Map a quote-to-job handover

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

quote fields, approval policy, job stages, assigned teams. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Specify what must pass from accepted quote to scheduled job, including scope, exclusions, payment state and change approval. Identify missing handover data. Inputs: [quote fields, approval policy, job stages, assigned teams]. Return field map, handover checklist, failure paths. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

field map, handover checklist, failure paths. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No job booking or customer commitment without approved terms. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

167. Find duplicate customer records safely

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

synthetic contact rows, matching rules, source-of-truth policy. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Propose duplicate clusters with confidence and conflicting fields. Preserve consent history and do not merge based only on similar names. Inputs: [synthetic contact rows, matching rules, source-of-truth policy]. Return candidate clusters, conflict report, review actions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

candidate clusters, conflict report, review actions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Human verifies identity before any merge/delete. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

168. Design a support-triage queue

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

redacted tickets, urgency policy, service commitments, escalation contacts. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Classify by supplied urgency rules and route to owners. Separate safety/payment/security issues for human escalation and avoid promising unavailable resolution times. Inputs: [redacted tickets, urgency policy, service commitments, escalation contacts]. Return triage table, acknowledgement drafts, escalations. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

triage table, acknowledgement drafts, escalations. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Check real service commitments and current owner availability. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

169. Create a complaint response pack

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

redacted complaint, verified order facts, policy, approved remedies. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Draft an acknowledgement, factual investigation questions and conditional resolution options. Do not admit unverified liability or waive consumer rights. Inputs: [redacted complaint, verified order facts, policy, approved remedies]. Return reply drafts, evidence checklist, options. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

reply drafts, evidence checklist, options. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Responsible manager approves remedy/words; no refund or legal commitment. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

170. Plan a capacity-aware weekly workload

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

staff availability, job estimates, skills, dependencies, approved priorities. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Allocate draft work within actual capacity, show overload and contingency, and preserve rest/access constraints. Do not invent staff consent or overtime. Inputs: [staff availability, job estimates, skills, dependencies, approved priorities]. Return draft schedule, conflicts, owner decisions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

draft schedule, conflicts, owner decisions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Manager verifies estimates and staffing before assignment. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

171. Design a change-request log

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

project scope, approval limits, sample requests, change policy. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Classify scope changes, estimate information needed and draft a change note separating proposed work from approved work. Inputs: [project scope, approval limits, sample requests, change policy]. Return change register, impact questions, approval template. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

change register, impact questions, approval template. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No new price/deadline commitment until owner/client approval. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

172. Build a quality-control checklist

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

service standard, known defects, evidence requirements, reviewer roles. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Create checks tied to observable evidence and explicit pass/fail criteria. Include rework and escalation, not a decorative tick-box list. Inputs: [service standard, known defects, evidence requirements, reviewer roles]. Return checklist, sampling plan, defect log. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

checklist, sampling plan, defect log. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Qualified reviewer validates safety/technical criteria. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

173. Prepare a business-continuity tabletop

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

critical processes, approved dependencies, outage scenario, recovery owners. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Simulate a tool outage using fictional events. Identify manual fallback, data reconciliation and recovery decision points without accessing systems. Inputs: [critical processes, approved dependencies, outage scenario, recovery owners]. Return tabletop script, recovery checklist, gaps. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

tabletop script, recovery checklist, gaps. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Owner/security reviews; no destructive live test. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

PROCESSES AND SERVICE DELIVERY

174. Turn a meeting into an action register

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

consented transcript, attendees, decisions, disputed points. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Extract decisions and actions with source quotes, owners only where explicitly assigned and dates only where stated. Keep proposals and open questions separate. Inputs: [consented transcript, attendees, decisions, disputed points]. Return decision log, action table, ambiguity list. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

decision log, action table, ambiguity list. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Attendees confirm attribution; no invitations or messages sent. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

175. Frame a decision-ready market study

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

product concept, target geography, decision, approved research sources. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Define the decision, hypotheses and evidence needed. Separate market size, reachable segment and actual buyer evidence; do not fill missing numbers from memory. Inputs: [product concept, target geography, decision, approved research sources]. Return research brief, source plan, uncertainty register. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

research brief, source plan, uncertainty register. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Use dated primary sources and verify figures before investment decisions. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

176. Compare competing products with sources

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

named products, decision criteria, current official pages/quotes. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Build a dated comparison of actual features, price units, limitations and terms. Preserve unknowns and do not equate vendor claims with tested performance. Inputs: [named products, decision criteria, current official pages/quotes]. Return source-linked matrix, tradeoffs, missing checks. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

source-linked matrix, tradeoffs, missing checks. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Verify current merchant facts; no purchase or feature guarantee. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

177. Analyse public buyer questions

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

permitted public excerpts, source URLs/dates, product category. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Group explicit questions by need and buying stage. Separate observed words from inferred intent; deduplicate cross-posts and do not collect private profiles. Inputs: [permitted public excerpts, source URLs/dates, product category]. Return theme table, example quotes, research gaps. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

theme table, example quotes, research gaps. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Respect terms/privacy; questions are not permission to contact. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

178. Design customer-discovery interviews

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

research objective, approved participant route, consent script. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Write neutral questions about real behaviour and current alternatives. Avoid leading respondents to praise the proposed product. Inputs: [research objective, approved participant route, consent script]. Return interview guide, consent draft, synthesis framework. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

interview guide, consent draft, synthesis framework. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Participant permission and approved contact scope before recruitment. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

179. Assess a launch positioning hypothesis

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

verified product capabilities, competitor evidence, customer research. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Draft three positioning options tied to evidence, with audience/problem/difference/proof. Mark unsupported claims and rejected alternatives. Inputs: [verified product capabilities, competitor evidence, customer research]. Return positioning cards, claim-evidence ledger. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

positioning cards, claim-evidence ledger. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No first/best/guaranteed claim without proof and review. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

180. Build a feature-priority matrix

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

user requests, frequency evidence, effort estimates, dependencies. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Score proposed features with explicit weights and sensitivity analysis. Distinguish reported needs from assumptions and show who must decide tradeoffs. Inputs: [user requests, frequency evidence, effort estimates, dependencies]. Return priority matrix, assumptions, decision questions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

priority matrix, assumptions, decision questions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Product owner validates data; scoring is advice not automatic roadmap. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

181. Plan a pricing-research exercise

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

product scope, cost facts, competitor prices, research budget. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare pricing structures and draft neutral willingness-to-pay questions. Do not claim a normal price, discount or margin without supplied evidence. Inputs: [product scope, cost facts, competitor prices, research budget]. Return pricing hypotheses, interview questions, test plan. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

pricing hypotheses, interview questions, test plan. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Owner approves prices/fees and lawful research before any live test. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

182. Create a product-launch readiness review

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved product brief, assets, support plan, known limitations. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Audit factual claims, onboarding, billing, support, accessibility and rollback. Produce a launch/no-launch recommendation with blockers, not invented sign-offs. Inputs: [approved product brief, assets, support plan, known limitations]. Return readiness checklist, blockers, responsible owners. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

readiness checklist, blockers, responsible owners. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Actual systems and terms must be tested by authorised people. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

183. Analyse a new market-entry option

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

geography, product facts, official regulatory/source material, cost assumptions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare three entry routes, required local checks and cost uncertainties. Do not offer legal/tax approval or assume a licence transfers. Inputs: [geography, product facts, official regulatory/source material, cost assumptions]. Return route comparison, source list, questions for advisers. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

route comparison, source list, questions for advisers. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Qualified local review before commitments or claims. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

MARKET RESEARCH, PRODUCTS AND LAUNCHES

184. Turn research into a launch experiment

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

evidence ledger, approved audience, budget ceiling, decision thresholds. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Design a small measurable experiment with baseline, stop rule and actual owner approvals. Separate learning objective from sales forecast. Inputs: [evidence ledger, approved audience, budget ceiling, decision thresholds]. Return experiment brief, measures, review gate. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

experiment brief, measures, review gate. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No ad spend, outreach or publication without explicit approval. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

185. Qualify a permitted Bark alert

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

user-authorised Bark alert/listing text, service criteria, visible terms/date. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Extract the buyer request, location, actual scope, deadline and fit. Mark hidden contact data and paid unlock requirements. Do not claim the person asked this business directly or scrape/unlock anything. Inputs: [user-authorised Bark alert/listing text, service criteria, visible terms/date]. Return source-linked opportunity card, fit reasons, gaps. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

source-linked opportunity card, fit reasons, gaps. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Use permitted account alerts/manual view; owner approves any credits/contact. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

186. Review a hipages opportunity

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

authorised hipages lead text, trade scope/licence facts, location, visible lead conditions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare the request with actual trade/service capability and coverage. Flag licence, capacity, fees and lead-acceptance terms before action. Inputs: [authorised hipages lead text, trade scope/licence facts, location, visible lead conditions]. Return fit checklist, missing facts, proposed reply for review. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

fit checklist, missing facts, proposed reply for review. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No automatic acceptance, fee spend or off-platform bypass. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

187. Triage an allowed Facebook group post

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

permitted post excerpt/link/date, group rules, relevant service scope. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Summarise explicit service need and allowed response route. Distinguish a recommendation request from permission for unsolicited DM; do not scrape members or private content. Inputs: [permitted post excerpt/link/date, group rules, relevant service scope]. Return request summary, rule check, draft public reply if allowed. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

request summary, rule check, draft public reply if allowed. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Admin/platform rules and approved recipient/words govern any response. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

188. Build a no-scrape opportunity inbox

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved sources and alerts, service keywords, geography, review cadence. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Specify a workflow using native alerts, approved APIs or manually supplied permitted exports. Include duplicates, source dates, missing access and a human review queue. Inputs: [approved sources and alerts, service keywords, geography, review cadence]. Return alert configuration brief, schema, exception paths. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

alert configuration brief, schema, exception paths. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Verify source terms/API access before setup; no password, paywall or bot bypass. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

189. Deduplicate cross-platform requests

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

permitted listing cards, source URLs/dates, visible identifiers. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Identify possible duplicates without asserting identity from similar names. Keep sources separate and flag when verification is needed before any contact. Inputs: [permitted listing cards, source URLs/dates, visible identifiers]. Return possible clusters, confidence reasons, retained source IDs. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

possible clusters, confidence reasons, retained source IDs. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No cross-platform personal-data enrichment without lawful authority. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

190. Draft a source-specific proposal

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

verified buyer brief, approved service scope/price, platform rules, evidence. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Write a tailored draft that answers the actual request and uses only verified case evidence. Keep forbidden external links/contact out of platform proposals. Inputs: [verified buyer brief, approved service scope/price, platform rules, evidence]. Return proposal draft, requirement checklist, missing inputs. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

proposal draft, requirement checklist, missing inputs. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Owner approves words/terms and correct submission route; fees separate. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

191. Check a formal tender before bidding

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

current official tender/addenda, entity facts, capability evidence, deadlines. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Build compliance matrix covering every required section, format, eligibility, pricing and route. Do not substitute a generic email for a prescribed bid. Inputs: [current official tender/addenda, entity facts, capability evidence, deadlines]. Return compliance matrix, required evidence, go/no-go gaps. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

compliance matrix, required evidence, go/no-go gaps. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Verify deadline/timezone/current addenda; authorised bid owner decides. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

192. Monitor a permitted request for changes

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

stable source ID, allowed alert/API, last verified state, expiry. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Specify change-only monitoring for deadline/scope/status, with stop-on-closure and access failure handling. Do not repeatedly poll a logged-in site without approved cadence. Inputs: [stable source ID, allowed alert/API, last verified state, expiry]. Return monitor specification, state comparison, owner escalation. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

monitor specification, state comparison, owner escalation. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Native alerts preferred; verify permission/rate limits and no automated outreach. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

193. Research public service-offer directories

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

permitted public listings, comparison criteria, source dates. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare service offers by published scope and evidence, without harvesting personal contacts or treating listing presence as buyer intent. Inputs: [permitted public listings, comparison criteria, source dates]. Return source-linked supplier comparison, unknowns. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

source-linked supplier comparison, unknowns. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Respect terms and verify claims directly before selection. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BUYER INTENT AND PLATFORM-SAFE OPPORTUNITY RESEARCH

194. Prepare a buyer-response handover

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

verified request, source restrictions, approved draft, owner, status. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Create an internal handover separating assigned, drafted, submitted and buyer-replied states. Include receipts only when verified and keep opt-out/restriction flags prominent. Inputs: [verified request, source restrictions, approved draft, owner, status]. Return handover note, status fields, next action. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

handover note, status fields, next action. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No false sent status; disclosure/recipient and send authority still required. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

195. Match an opted-in jobseeker to roles

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

consented jobseeker criteria, permitted current job listings, role requirements. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare role requirements with supplied candidate evidence, flag gaps and location/work constraints. Do not apply or infer protected attributes. Inputs: [consented jobseeker criteria, permitted current job listings, role requirements]. Return match matrix, source dates, questions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

match matrix, source dates, questions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Candidate approves applications and disclosures; verify vacancy live. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

196. Check a job advertisement for warning signs

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

public ad/source, employer facts from reliable sources, candidate concerns. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Identify evidence-backed inconsistencies, upfront-fee requests and missing terms without declaring fraud from weak signals. Inputs: [public ad/source, employer facts from reliable sources, candidate concerns]. Return risk questions, source checks, cautious summary. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

risk questions, source checks, cautious summary. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No contact/payment/documents sent; verify employer through trusted route. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

197. Draft a skills-gap learning plan

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

role target, candidate-approved skills evidence, time/budget limits. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Propose practical learning milestones and a synthetic portfolio exercise tied to job criteria. Do not invent credentials or guarantee employment. Inputs: [role target, candidate-approved skills evidence, time/budget limits]. Return learning plan, evidence milestones, course verification needs. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

learning plan, evidence milestones, course verification needs. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Verify current course fees/recognition before spending. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

198. Audit a business knowledge base

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved documents, owner/date metadata, recurring questions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Find conflicting, stale or unsourced answers. Draft replacements only from approved evidence and list unresolved questions. Inputs: [approved documents, owner/date metadata, recurring questions]. Return conflict register, answer drafts, owners. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

conflict register, answer drafts, owners. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No publication until document owners approve facts. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

199. Create a permission register

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

approved workflow descriptions, data categories, recipients, current grants. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Map required access, disclosure and actions to explicit authority and identify gaps. Do not turn a workflow plan into permission. Inputs: [approved workflow descriptions, data categories, recipients, current grants]. Return permission matrix, unresolved approvals, expiry checks. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

permission matrix, unresolved approvals, expiry checks. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Owner validates grants; no secrets or unnecessary personal data. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

200. Test a proposed automation with synthetic data

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

workflow specification, test environment, expected states, fallback owner. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Write normal, missing-data, duplicate, opted-out, failed-write and retry cases. Require destination-state evidence instead of a success toast. Inputs: [workflow specification, test environment, expected states, fallback owner]. Return test cases, expected results, rollback criteria. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

test cases, expected results, rollback criteria. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No live action until authorised test evidence and owner sign-off. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

201. Review an AI draft for unsupported claims

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

draft copy, source-fact sheet, audience/channel. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Mark every price, statistic, credential, testimonial and outcome claim as supported, uncertain or unsupported. Rewrite without inventing proof. Inputs: [draft copy, source-fact sheet, audience/channel]. Return claim ledger, corrected draft, unresolved questions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

claim ledger, corrected draft, unresolved questions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Source owner approves final facts; no blanket zero-error certification. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

202. Prepare a privacy-minimised analysis brief

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

analysis objective, data schema, access policy, retention rules. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Select only necessary fields, replace identifiers with synthetic/pseudonymous keys where appropriate and plan restricted output. Do not claim anonymisation without assessment. Inputs: [analysis objective, data schema, access policy, retention rules]. Return minimum-data brief, exclusions, access/retention checks. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

minimum-data brief, exclusions, access/retention checks. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Privacy/security owner approves handling before real upload. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

203. Build a monthly operations review

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

verified KPIs, definitions, source dates, open actions. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Explain trends with denominator checks, separate causes from hypotheses and propose a short owner/action/date list. No invented benchmarks. Inputs: [verified KPIs, definitions, source dates, open actions]. Return review memo, exceptions, evidence-backed actions. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

review memo, exceptions, evidence-backed actions. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

Owners verify current figures and commitments. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

JOB OPPORTUNITIES, KNOWLEDGE AND CONTROLS

204. Evaluate whether to automate a task

DRAFT / ANALYSE / SPECIFY - ACCESS AND ACTIONS SEPARATELY VERIFIED

Inputs to supply

observed task, frequency, error cost, tool evidence, review burden. State the reporting date/timezone, currency where relevant, source dates, intended audience and what is not yet verified.

Copyable prompt

Work only from the supplied approved evidence. Compare manual, assisted-draft and automated options. Include setup, supervision, failure recovery and privacy costs; recommend a pilot only where justified. Inputs: [observed task, frequency, error cost, tool evidence, review burden]. Return option matrix, assumptions, small-pilot plan. Cite source rows or supplied document sections beside factual conclusions. Label missing facts, assumptions and uncertain matches. Do not invent data, credentials, permissions, live access, measured results or completed actions. Give a usable first draft plus the smallest decision list that blocks safe use. Do not send, publish, accept terms, change records, spend credits or contact anyone.

Expected output

option matrix, assumptions, small-pilot plan. Include source/evidence, unresolved gaps, proposed owner and review status, so a draft is not mistaken for a completed action.

Review and operational gate

No universal autonomous capability or savings guarantee; owner approves action. Check current source state before any consequential action. If access or evidence is unavailable, report the missing check rather than fill it with a plausible answer.

BEFORE YOU CLOSE THE BOOK

Measure, then believe.

Everything in this book comes back to one habit: baseline

first, change one thing, measure again. Here is the rhythm that

keeps it honest.

The five numbers that matter

The 90-day rhythm

1

Days 1-30

Coverage. Answer everything. Baseline the five numbers.

2

Days 31-60

Conversion. Follow-ups, reminders, quotes. Watch bookings move.

Calls and messages answered - what share of enquiries reach a response, day **and night. Coverage you can check in the log.**

Response time - minutes from enquiry to answer. The number your competitors **are quietly losing to.**

Bookings and quotes from enquiries - the funnel step where interest becomes **revenue.**

Review count and rating trend - proof, compounding monthly.

Hours returned to you - the admin you stopped doing. Spend it on the tools or **on your family; both are wins.**

Author biography and career claims are supplied by the author and have not been independently audited.

PUT THIS BOOK TO WORK

Want this running in your business?

Want to see AI agents working in your business? Agents like Xpress AI Coworker are hands-on and proactive - they answer calls, sort inboxes and follow up leads while you approve every action - and you can try one out.

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Author-edition note: Ram Valia, founder of Xpress AI and author of this book. Measure useful outcomes, not generated activity.

Born and raised in Mumbai, India, Ram Valia is the son of a businessman. He grew up drawn to business and spent the first ten years of his career building the industry experience that would shape his own approach. His career includes a financial-planning background with Commonwealth Bank of Australia and National Australia Bank. A growing interest in marketing led him to launch his own agency.

Ram has now run a marketing agency for ten years. He works with a global team of more than 150 people, serving clients in Australia, New Zealand, Canada and the United States. Clear processes, standard operating procedures and structured client work help the team support those clients.

Since 2019, Ram and his team have worked with the NSW Government as an official collaboration partner in the Small Business Month initiative. Through those events, they have helped more than 20,000 people understand AI and marketing. Their advertising work spans thousands of businesses, with more than 150 million impressions and more than 150,000 leads generated. Their appointment team follows up leads and books meetings, connecting marketing activity with business opportunities.

His work brings finance, marketing and technology together with a practical aim: plan carefully, put systems to work and measure the results. This book follows the same approach, giving business owners clear explanations and specific steps to implement. Ram wants to bring these methods to millions of businesses. His personal motto captures the mindset behind that ambition: "It's all in the mind."

Event and campaign figures supplied by the author; not independently audited. Past results do not guarantee future performance.

A last word

The owners who win with AI agents won't be the ones who bought the most tools. They'll be the ones who found their biggest leak, fixed it properly, measured the change, and then fixed the next one. You have everything you need to be one of **them.**

Keep going

If you're ready to put a digital co-worker on your phones, inbox and follow-ups,

explore the platform and its 96 public-library prompts at:

xpressaicoworker.com

The 108 authored prompts and worked campaigns are separate teaching material, not verified platform commands.

Start with the audit in Part 1. Establish a baseline, choose a small pilot, verify the result and keep what genuinely helps your business.

you more about your business than most reports you've paid for.

Thank you

For reading, measuring and doing the disciplined weeks that make the numbers move. Keep the evidence, review the work and build on the useful results.

make the numbers move. That's the whole secret - there never was another

one.

THE PEOPLE BEHIND THIS BOOK

About us

Xpress AI builds practical AI co-workers for local businesses - agents that answer the phone, sort the inbox, follow up quotes and keep customers warm. They are hands-on and proactive from day one, and you can try one on your own business.

Xpress AI was founded by Ram Valia. Ram has run his own marketing agency, Marketing Transformers, for around a decade, leading a global team of more than 150 people serving clients in Australia, New Zealand, Canada and the USA. Before marketing, he worked in financial planning at the Commonwealth Bank of Australia and National Australia Bank.

Free AI audit + strategy call

See where AI agents can save real hours in your business. Book a free strategy call and we will map your first workflow together.

BOOK A FREE STRATEGY CALL >

Try Xpress AI Coworker: A$5 for the first month, then A$397/month, with full white-glove onboarding.

Ram Valia / Founder, Xpress AI

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