



Four rules before you paste anything

Start here. These four keep the tools on the other side from creating new problems.

01 Keep a human in the loop

AI writes the draft. You own what goes out. Nothing reaches a customer, an employee, or a regulator without a person reading it end to end.

- › Read every word before it leaves your hands
- › Check numbers, dates, prices, and names against the source
- › If it does not sound like you, it is not finished
- › Never automate a decision you could not defend in person

02 Protect the data you feed it

Treat the prompt box like a public whiteboard. Assume anything you paste could be retained unless you have verified the tool's privacy and data settings.

- › No social security numbers, full bank or card numbers, medical records, or employee files
- › Strip customer names and addresses first - use "Customer A"
- › Keep client contracts, pricing, and anything under NDA out of it
- › Check the provider's privacy, retention and model-training settings before using business data

03 Restrict access on purpose

Not everyone needs every tool and every file. Decide who can connect AI to what, before someone connects it for you.

- › Give AI tools the smallest set of files that does the job
- › Keep work accounts and personal accounts separate
- › Review access every quarter and remove people who left
- › Write down what got connected, so you can answer "where did that go?"

04 Start with the problem, not the tool

The tool matters far less than whether you picked a real problem. Most failed AI projects were a solution hunting for a job.

- › Name the task and the hours it costs you every week
- › Do it by hand with AI once before you buy anything
- › If you cannot measure the before, you cannot claim the after
- › Switching tools is cheap. Switching problems is expensive

**USE AI.
KEEP THE
JUDGMENT.**

Treat AI like a fast, tireless intern with perfect grammar and no judgment. Give it the work - not the final decision.

→ Flip this page: 2 prompts, 1 connector, 1 skill



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**Want to see where we can
go with AI today?**

Give us a call.

No pitch. We look at one task you
already do.

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AI You Can Use Today

Start with a prompt. Then connect the tools you already use. Then teach it how you work.

START HERE

Change only the words in [brackets].

Everything else stays exactly as written. Paste your real material, never a made-up example.

01 PROMPT

The reply you have been avoiding

An angry customer email into two ready drafts.

You are the owner of a [type of business] with a reputation for being fair but not a pushover.

Below is a complaint I received from a customer. Write a reply that:

- acknowledges the specific problem, not a generic apology
- states clearly what I will and will not do
- stays under 150 words
- sounds like a person, not a corporate policy

Give me two versions: one warmer, one firmer.

Here is the complaint:
[paste the actual email]

02 PROMPT

The messy list you keep avoiding

A junk spreadsheet into a clean table and three real insights.

Attached is a file of [describe the data, e.g. "my customer list export"]. It is messy: inconsistent formatting, duplicates, missing fields.

Do three things:

1. Tell me what is actually in this file and what is wrong with it
2. Clean it into a consistent table
3. Tell me the three most useful things this data reveals about my business

Do not make up any data you cannot see in the file.

03 CONNECTOR · GMAIL

Stop pasting. Let it read your inbox.

A connector plugs a tool you already use straight into the AI. Start with Gmail - it is where the most money quietly falls through the cracks.

- 1 Open Settings, then Connectors, and connect Gmail
- 2 Grant the narrowest access that still does the job
- 3 Ask: "Find emails I sent in the last 30 days that never got a reply"
- 4 Then: "Draft a short follow-up for each one, in my voice"

Rule 03 still applies. A connector is standing access to your inbox, not a one-time paste.

04 SKILL

Teach it once. It remembers how you work.

A skill is a short instruction file the AI loads by itself whenever a matching task comes up. It turns your best prompt into something you never retype.

- 1 Take a prompt that worked and that you will use again
- 2 Write down the steps, the output format, and your own rules
- 3 Save it as a skill in Settings, then Capabilities - or just ask the AI to write the skill from what you worked out together
- 4 Next time just say what you need. The skill fills in the rest.

Rule 01 still applies. A skill automates the work, never the approval.

IDEAS FACTORY

Business Workflow Automations

These prompts save you minutes. An automation saves you the whole task - quotes, follow-ups, scheduling, reporting - running without you in the loop.

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See it working

← Flip back: the 4 rules that keep this safe



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