Where to start

Name _____

01 · FIND YOUR STARTING POINT

Jot one or two tasks from your own week in each box. If a task fits more than one box, write it in each.

Where are you the bottleneck?

Tasks that only move when you touch them.

_____

_____

Where do the same mistakes keep happening?

Repetition with errors signals an unwritten process.

_____

_____

Which tasks repeat the same way every time?

Same inputs, same steps, same output: these are AI-ready.

_____

_____

Start with the easier, repetitive admin: not your most complex process, your most boring one.

02 · 3 QUESTIONS BEFORE YOU TOUCH AI

Pick your top three from above and copy them in: anything you wrote in more than one box first, then the most boring, repetitive ones. Tick Yes or Not yet for each question.
Any Not yet: it goes in FIX FIRST on your plan.

YOUR TASK One per row	Is the process documented? If you can't explain it to a person, you can't hand it to AI.	Is the quality defined? AI needs to know what "good" looks like. And so do you.	Is there a human owner? Someone still needs to check the output. Who is that person?	ANY NOT YET? Goes in
1	☐ Yes ☐ Not yet	☐ Yes ☐ Not yet	☐ Yes ☐ Not yet	☐ FIX FIRST
2	☐ Yes ☐ Not yet	☐ Yes ☐ Not yet	☐ Yes ☐ Not yet	☐ FIX FIRST
3	☐ Yes ☐ Not yet	☐ Yes ☐ Not yet	☐ Yes ☐ Not yet	☐ FIX FIRST

Next: carry these tasks onto **Your one-page plan**. All three Yes? Run it through the two questions there. A Not yet here is the same as a No to question 1.

Your one-page plan

Name _____ Business _____

QUESTION 1 · ASK THIS FIRST

Could a new hire do it from your written instructions?

No: write it in **FIX FIRST**. Write it down before AI goes near it.
Yes: go to question 2.

QUESTION 2

If AI gets it wrong, would a check catch it in time?

Yes: write it in **HAND TO AI**, and match the check to the cost.
No, or it's a judgement call: write it in **KEEP HUMAN**.

Start with the tasks from your Where to start sheet: any Not yet goes straight into FIX FIRST. Then add any other jobs that eat your week, one per line, in the column the two questions give you. **Tick the box** beside any job you already use AI on where it isn't working. **Then circle the one job you'll start with.**

FIX FIRST No written process yet	HAND TO AI A check catches mistakes	KEEP HUMAN Judgement and relationships
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐
☐	☐	☐

Ideas, settings and next steps

TEN JOBS AI ALREADY DOES WELL

Tick the ones you do every week, and use them for ideas on your plan.

☐ **01 Quotes and proposals**
From job notes or a voice memo to a priced draft in your format. You check the numbers and hit send.

☐ **02 Customer emails**
Replies, follow-ups and the awkward ones (a late payer, a price rise), in your tone. You just edit.

☐ **03 Meeting and site notes**
A rambling voice memo or a whiteboard photo turned into clean notes and a list of actions.

☐ **04 FAQs and repeat answers**
The questions you answer forty times a year, answered once, properly, and reused everywhere.

☐ **05 Customer sentiment**
Hundreds of reviews, surveys and feedback emails read in minutes, names removed. See what people love and what's slipping, then decide what to change.

☐ **06 Repurpose your content**
Your video, talk or long post turned into an article, a newsletter and a month of posts. Your ideas, reshaped.

☐ **07 Onboarding new staff**
Turn the guides you already have into a checklist, a short quiz and a first-week plan.

☐ **08 Prep before a pitch**
A prospect's website, news and public profile pulled into a one-page brief before you walk in.

☐ **09 Long documents, quick answers**
Tenders, industry reports and policies summarised, with your questions answered. Only documents you're allowed to share.

☐ **10 A sounding board**
Pressure-test a plan, a price change or a tricky email before it goes out. It argues back, and you decide.

AI can do all ten. Whether it should, in your business, is what your plan decides.

TWO SETTINGS. TWO MINUTES. TONIGHT.

ChatGPT: Settings → Data controls. Turn off “Improve the model for everyone”.

Claude: Settings → Privacy. Turn off “Help improve our AI models”.

New chats stop being used to train future models. Your history stays. If your menu names look different, look for the same words.

THREE THINGS THAT NEVER GO IN

01 Client identifying details: names, phone numbers, addresses.

02 Sensitive financials: bank details, payroll, full statements.

03 Confidential material: NDAs, client contracts, anything you’ve promised to protect.

A rule nobody wrote down is a rule nobody follows. Write these three lines where the whole team can see them.

WHAT NEXT

Tonight: change the two settings, then once on every account at work.

This week: use AI on the job you circled every time it comes up.