

# YOUR AI PRODUCTIVITY TOOLKIT

## From First Prompt to Full Automation

A step-by-step guide from first prompt to full automation

**97%**

of workers have  
tried AI tools

**15%**

report finding  
real value

**111x**

context window  
growth in 3 years

**15-25 hrs**

recoverable per  
week with AI

12 Use Cases

3 Skill Tiers

10 Free Tools

Copy-Paste Prompts

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## Your Implementation Roadmap

WEEK 1	MONTH 1	QUARTER 1
Try items 1-4. Ask AI one personal question. Reply to 5 emails with AI. Summarize one report.	Set up Granola for meetings. Build a research workflow with NotebookLM + Perplexity. Create one SOP with Scribe.	Build a Claude Project with your data. Set up one autonomous workflow. Train your team on the Novice tier.

# The First Week

No technical skills required. Everything here is free or under \$20/month.

## 1. Ask AI a Personal Question

2 min | Free | Any AI

This builds trust faster than any business case. When AI tells you something accurate about yourself, you cross the trust threshold.

Open [claude.ai](https://claude.ai), [chatgpt.com](https://chatgpt.com), or [gemini.google.com](https://gemini.google.com) (all free). Upload your resume, a DISC/Myers-Briggs assessment, or LinkedIn profile.

"Based on this information, what patterns do you see in my career decisions? What do I seem to value most? Where might I have blind spots?"

**Result:** A profile that surfaces patterns you knew intuitively but never articulated.

### PRO TIP

Push back where it feels wrong. The follow-up conversation is where real insights emerge.

### COMMON MISTAKE

Starting with work tasks. Personal relevance builds trust faster than any business use case.

## 2. Reply to Emails in 2 Minutes Instead of 15

5 min | Free | Lemon or any AI

Copy a long email you need to reply to. Paste it into any AI tool with this prompt:

"Draft a professional reply to this email. Keep it under 100 words. Tone: direct but warm. Key point I want to make: [your point]."

Review, edit for 30 seconds, send. Apply to 10 emails/day and recover an hour.

### PRO TIP

Save your best reply prompts. Build a template library organized by tone and context.

### COMMON MISTAKE

Sending AI drafts without editing. Thirty seconds of review makes it yours.

## 3. Prepare for Any Meeting in 10 Minutes

10 min | Free | Claude or NotebookLM

Gather the meeting agenda, relevant docs, and attendee list. Upload everything to Claude or NotebookLM.

"Based on this agenda and these documents, what are the three most important questions I should ask? What is the one thing that could go wrong that nobody is talking about?"

**Result:** You spot issues and ask questions that make you the most prepared person at the table.

### PRO TIP

Upload the attendee list too. AI can research each person and suggest talking points.

### COMMON MISTAKE

Only reading the agenda. Upload background docs for deeper preparation.

## 4. Summarize a 40-Page Report in 60 Seconds

1 min | Free | Claude or ChatGPT

Upload a PDF, contract, report, or article to any AI tool.

"Summarize this document in 5 bullet points. Then tell me the one thing I should be most concerned about."

**Result:** A 40-page report becomes a 30-second read. Faster decisions about where to invest your attention.

### PRO TIP

Follow up with "What did I miss?" AI catches nuance on the second pass.

### COMMON MISTAKE

Trusting the summary blindly. Spot-check one claim against the source document.

### KEY PRINCIPLE: Start Personal Before Professional

If you do not trust AI with your own life questions, you will not trust it with business decisions. The bridge from trial to trust starts with a question that matters to you personally. 97% have tried AI, but only 15% found real value. The difference is personal relevance.

# The Power User

Move from asking questions to building systems. Connect AI to your actual workflows.

## 5. Turn Meeting Notes into Action Items Automatically

15 min setup | Free-\$10/mo | Granola

Install Granola (granola.ai). Works with Zoom, Teams, Meet, or in-person meetings. Join your next meeting normally; Granola transcribes in the background.

After the meeting, chat with your notes:

"Draft a follow-up email to the client summarizing what we agreed to."

**Result:** 3-5 hours/week recovered. Every meeting produces a searchable record.

### PRO TIP

Draft the follow-up email immediately after the call ends. Speed builds credibility with clients.

### COMMON MISTAKE

Waiting until end of day. Capture action items within 5 minutes while context is fresh.

## 6. Build a Research Workflow That Cuts Prep by 80%

20 min setup | Free | NotebookLM + Perplexity

Use Perplexity (perplexity.ai) to research a topic with cited sources. Upload the output plus your internal docs into NotebookLM.

"What are the three biggest risks in this deal based on the documents I uploaded?"

Use NotebookLM's Audio Overview to generate a briefing for your commute.

**Result:** Research that took half a day takes 20 minutes.

### PRO TIP

Use Audio Overview to turn research into a podcast briefing. Listen during your commute.

### COMMON MISTAKE

Using only one source. Cross-reference Perplexity's cited sources with your own internal docs.

## 7. Turn Email Threads into Polished Presentations

15 min setup | Free | Claude + Gamma

In Claude, click "+" then "Connectors." Connect Gamma and Gmail.

"Find my discovery call notes from [client] in Gmail. Pull their project brief from Notion. Create a campaign proposal deck."

Open the Gamma link. Apply your saved brand style.

**Result:** A presentation that took 2-3 hours is drafted in 5 minutes.

### PRO TIP

Save your brand style in Gamma once. Every future deck matches automatically.

### COMMON MISTAKE

Building decks from scratch each time. Connect your tools and let AI pull existing context.

## 8. Create SOPs Without Writing Them

20 min/SOP | Free | Scribe + Claude

Install the Scribe browser extension (scribehov.com). Turn on Scribe, then complete the process you want to document as you normally would. Scribe captures every click.

"Clean this up into a professional SOP. Add a purpose statement, prerequisites, and troubleshooting tips."

**Result:** An SOP done in 20 minutes instead of 4-8 hours. Every process documented and transferable.

### PRO TIP

Record the actual process, then ask Claude to add edge cases and troubleshooting.

### COMMON MISTAKE

Documenting ideal processes. Record how work actually gets done, including workarounds.

### KEY PRINCIPLE: Use Multiple Models

Run the same prompt through Claude, ChatGPT, and Gemini. Compare outputs. When three models converge, that is signal. When they diverge, that tells you where interpretation is ambiguous. This is how judgment forms. Do not marry one tool.

# The Frontier

Build systems that run without you. Only about 2% of the workforce operates at this level.

## 9. Autonomous Daily Briefings (Zero Meetings)

30 min | Free | Viktor + Slack

Connect Viktor (getviktor.com) to Slack. Authorize data sources (Stripe, Google Ads, Linear, GitHub, HubSpot).

Every weekday at 8:30am, post revenue from Stripe, open issues from Linear, and deploy status from GitHub to #team-updates.

**Result:** Your team starts the day aligned without a standup. Add Friday recaps and monthly reports with one message.

### PRO TIP

Start with one daily briefing. Add cadences once you trust the output.

### COMMON MISTAKE

Overcomplicating the first setup. One channel, one source, one cadence.

## 10. Context Engineering: Build a Portable AI Workbench

1-2 hrs | Free | Claude Projects, Custom GPTs, Codex folders

Package your business context so outputs can move across models. Keep voice, examples, source docs, decision criteria, constraints, approved prompts, and handoff rules in one reusable library.

Build a portable context brief for this workflow. Include objective, inputs, constraints, examples, evaluation rules, approval owner, and handoff instructions.

**Result:** You switch engines without starting from scratch: same library, same rules, new model.

### PRO TIP

Keep context outside the model too: PDFs, Markdown, SOPs, examples, and eval rubrics in one folder.

### COMMON MISTAKE

Confusing model memory with business memory. Own the context outside any one platform.

## 11. Task Delegation with AI Agents

30-60 min | \$20/mo | Lindy, Codex, Claude, or n8n

AI agents handle recurring tasks without you. Lindy triages email and drafts replies. Codex implements, refactors, tests, and validates defined work. n8n connects 400+ apps.

Take this SOP and build the first automated version. Ask clarifying questions, identify risks, add tests, and keep a human approval step before sending or publishing.

**Result:** 8-10 hours/week saved. AI handles triage, drafting, implementation, and follow-ups.

### PRO TIP

Start with email triage or one internal workflow. Highest ROI, lowest risk.

### COMMON MISTAKE

Trying to automate everything at once. Pick one workflow and perfect it.

## 12. Advanced Prompt: Competitive Intelligence Brief

5 min | Free | Claude or ChatGPT

Upload annual reports, earnings transcripts, or internal docs. Then use this prompt:

You are a senior strategy consultant. Produce: (1) three-sentence executive summary, (2) three biggest strategic risks, (3) two opportunities competitors are missing, and (4) one recommendation with data.

**Result:** Board-quality strategic analysis in minutes instead of days.

### PRO TIP

Upload the competitor's 10-K alongside yours. AI finds gaps humans miss.

### COMMON MISTAKE

Running this without uploading docs. Generic analysis is worthless.

## KEY PRINCIPLE: Route the Work, Preserve the Decision

AI should compress the time to a decision, not replace the decision itself. Use the model that wins the workflow eval, but keep a named human decision owner: the Human Circuit Breaker. AI recommends. Humans decide.

# Tool Quick Reference

Tool	What It Does	Best For	URL	Cost	Level
<b>Claude</b>	General-purpose AI with long context, Projects, connectors, and strong writing style control	Deep analysis, long documents, writing in your voice, context engineering	<a href="https://claude.ai">claude.ai</a>	Free / \$20/mo	All
<b>ChatGPT</b>	General-purpose AI with Custom GPTs, image generation, voice, plugins, and GPT-5.5	Fast synthesis, analysis, writing, strategy, research, custom chatbots	<a href="https://chatgpt.com">chatgpt.com</a>	Free / \$20/mo	All
<b>Codex</b>	Agentic workbench for implementation, refactors, tests, debugging, spreadsheets, docs, and computer-use workflows	Building or operating from a defined SOP, codebase, task brief, or context pack	<a href="https://chatgpt.com/codex">chatgpt.com/codex</a>	Plan dependent	Intermediate+
<b>Gemini</b>	Google AI integrated with Workspace. Reads Gmail, Docs, Sheets natively. Strong multimodal support	Google Workspace users, video/image analysis, cross-referencing Google docs	<a href="https://gemini.google.com">gemini.google.com</a>	Free / \$20/mo	All
<b>Lemon</b>	Keyboard shortcut AI that works in any text field. Highlight text and rewrite without switching apps	Email replies, quick rewrites, grammar fixes	<a href="https://heylemon.ai">heylemon.ai</a>	Free	Novice
<b>NotebookLM</b>	Upload docs and query them conversationally. Audio Overview turns docs into briefings	Research synthesis, meeting prep, studying documents, audio briefings	<a href="https://notebooklm.google.com">notebooklm.google.com</a>	Free	Intermediate
<b>Perplexity</b>	AI-powered search engine that cites every source. Real-time web research	Competitive research, fact-checking, market analysis with verifiable sources	<a href="https://perplexity.ai">perplexity.ai</a>	Free / \$20/mo	Intermediate
<b>Granola</b>	Meeting transcription for Zoom, Teams, Meet, and in-person. Chat with notes after	Action items, follow-up emails, searchable meeting archive	<a href="https://granola.ai">granola.ai</a>	Free / \$10/mo	Intermediate
<b>Scribe</b>	Records your screen as you work and auto-generates SOPs with screenshots	Process documentation, onboarding guides, training materials	<a href="https://scribehow.com">scribehow.com</a>	Free	Intermediate
<b>Gamma</b>	AI presentation builder. Turns prompts and docs into polished slide decks	Pitch decks, proposals, campaign decks from email threads or notes	<a href="https://gamma.app">gamma.app</a>	Free tier	Intermediate
<b>Viktor</b>	Autonomous Slack agent that pulls live data from Stripe, GitHub, Linear, HubSpot	Daily standups, weekly reports, board updates, metric briefings in Slack	<a href="https://getviktor.com">getviktor.com</a>	Free	Advanced
<b>Lindy</b>	AI executive assistant via iMessage. Triage email, drafts replies, manages calendar	Email triage, meeting prep, calendar management, follow-up automation	<a href="https://lindy.ai">lindy.ai</a>	Free trial / \$20/mo	Advanced
<b>n8n</b>	Open-source workflow automation. Visual builder connects 400+ apps with AI steps	Multi-step automations: lead scoring, content pipelines, data enrichment	<a href="https://n8n.io">n8n.io</a>	Free self-hosted	Advanced

## Key Stats to Remember

<b>97%</b>	of knowledge workers have tried AI (McKinsey / Data Driven VC)
<b>15%</b>	report finding real, measurable value from AI usage
<b>2%</b>	of the workforce builds AI systems that transform how a business operates (Section)
<b>111x</b>	Claude context window growth: 9K tokens (2023) to 1M tokens (March 2026)
<b>4 mo</b>	AI capability doubling time, compressed from 7 months (METR Research)
<b>15-25 hrs</b>	recoverable per week by a single professional using free or low-cost AI tools

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Sources: McKinsey Global Survey on AI (2025), Section AI Proficiency Report (Jan 2026), Data Driven VC, Superhuman AI Newsletter, METR Research. Tools and pricing change quickly; validate current availability before rollout.

# The Model Portability Playbook

How to switch AI engines without rebuilding the workflow

## Core idea: The model changes. The workflow should not.

Use the same context pack, prompts, examples, evaluation rules, and approval owner across ChatGPT, Codex, Claude, Gemini, and whatever wins next month.

### 1. Build the Portable Context Pack

- **Company context** what you do, customers, markets, constraints
- **Workflow objective** what done looks like and who decides
- **Source docs** SOPs, notes, examples, policies, decks
- **Voice and style** tone, formatting, words to use or avoid
- **Evaluation rules** accuracy, usefulness, edit time, risk
- **Approval gate** named Human Circuit Breaker

### 2. Route the Work, Not the Loyalty

Work type	Default starting point
Strategy, synthesis, writing, analysis	ChatGPT / GPT-5.5
Builds, refactors, tests, workflow execution	Codex
Long-doc review, voice, deep context	Claude / Opus
Google Workspace and multimodal context	Gemini
Source-grounded research	Perplexity + NotebookLM

### 3. Run the 15-Minute Model Switch Drill

- Pick one recurring workflow** client follow-up, board memo, market scan, SOP, financial review
- Save the reusable context** background, examples, constraints, sources, approval rules
- Run the same task in two models** same prompt, same inputs, same success criteria
- Score the output** accuracy, usefulness, edit time, risk, speed
- Choose by workflow** not by brand loyalty or leaderboard screenshots

#### Executive Scorecard

<b>Accuracy</b>	1	2	3	4	5
<b>Usefulness</b>	1	2	3	4	5
<b>Edit time</b>	1	2	3	4	5
<b>Risk</b>	1	2	3	4	5
<b>Speed</b>	1	2	3	4	5

**This week: package one workflow, test it in two models, and save the winning pattern.**

Source note: GPT-5.5 and Claude Opus 4.7 benchmark references are from OpenAI and Anthropic release materials, April 2026. Benchmarks are directional; your workflow eval is the decision rule.