

THE FIELD GUIDE

TAKE BACK YOUR TIME WITH AI

Practical tools you can use Monday morning. Six workflows, the exact prompts behind them, and a simple plan to start with one.

Everything in here is built to be used rather than read. Each prompt is written to be copied, pasted into the AI assistant your company has approved, and adjusted for your business. Built from the workshop presented to the Midwest Insulation Contractors Association.

01 FIND REVENUE

02 WIN WORK

03 STRENGTHEN YOUR WEBSITE

04 CREATE MARKETING

05 ORGANIZE OPERATIONS

06 BUILD REPEATABLE
PROCESSES

START HERE

If you could get five hours back every week, where would you spend them? With customers, developing your team, growing the business, or simply getting home earlier?

That is the goal of this guide. Most lost time hides in the same five places: **searching** for information, **writing** something from scratch, **following up**, **organizing** work, and **repeating** a task you have already done before. Those are the places where AI can start giving time back.

You do not need to become an AI expert, and you do not need three new tools. Start with the one AI assistant your company has approved. In the workshop we used ChatGPT for research and drafting, Claude for polished documents, and Metricool for scheduling. Any one of them is enough to begin.

THREE WAYS TO USE IT

ON YOURSELF • Pick the section closest to the work that eats your week • Run that one prompt on a real task this week • Save the prompt that worked and run it again	WITH ONE PERSON • Hand an estimator, PM or office lead one prompt • Run it together on a live job • Compare the result to how long it usually takes	WITH A TEAM • Use the Monday plan on page 18 • One workflow a month, six months • Keep a shared library of prompts that work
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WHAT IS INSIDE

03	TELL AI FIVE THINGS	The simple structure behind every prompt in this guide, and how to fix a weak result.
04	FIND REVENUE	Search public sources for bids and early signals, then turn one into a first-contact email.
06	WIN WORK	Answer a quote request fast, ask the right questions, and package an approved quote.
08	STRENGTHEN YOUR WEBSITE	Audit where customers find you and rewrite the first screen they see.
11	CREATE MARKETING	Turn one finished job into five marketing pieces and schedule the month.
13	ORGANIZE OPERATIONS	Meeting notes into actions, field notes into a change-order draft, approved numbers into an invoice.
16	BUILD REPEATABLE PROCESSES	Capture what one experienced person knows and turn it into a usable SOP.
17	THE GUARDRAILS	What AI can do, what it should never decide, and the one rule that covers it.
18	YOUR MONDAY PLAN	Choose one task, write it down, and track the time it gives back.

CHOOSE ONE REPEATED TASK. USE ONE STRONG PROMPT. **MEASURE THE TIME IT SAVES.**

TELL AI FIVE THINGS

You do not need a magic prompt. You need to give AI the same five things you would give a sharp new employee.

- | | | | | |
|--|---|--|---|---|
| <h2>1</h2> <p>Role. Who should it act like?</p> | <h2>2</h2> <p>Task. What should it do?</p> | <h2>3</h2> <p>Details. What information does it need?</p> | <h2>4</h2> <p>Format. What should the finished result look like?</p> | <h2>5</h2> <p>Guardrails. What must it not do?</p> |
|--|---|--|---|---|

QUICK EXAMPLE

ROLE + TASK + DETAILS + FORMAT + GUARDRAILS

Act as an estimator. Draft a customer quote using the approved job details below. Format it as a one-page PDF. Do not create or change any prices. Clearly mark missing information.

IF THE FIRST RESULT IS WEAK

Do not start over. Tell it what is missing, the way you would coach a person:

MAKE IT SHORTER

USE SIMPLER
LANGUAGE

ADD EXCLUSIONS

ASK ME
QUESTIONS FIRST

MATCH THIS
EXAMPLE

HOW EVERY EXAMPLE IN THIS GUIDE WORKS

- 01 The task.** A real job that repeats in your business and takes real time.
- 02 What we give AI.** The facts, files and rules. AI is only as good as the information you hand it.
- 03 What AI produces.** A first draft, an organized list, a finished document. Never the final decision.
- 04 What we check.** A qualified person confirms names, numbers, scope, dates and anything that reaches a customer.

WHY GUARDRAILS MATTER

Every prompt in this guide ends with things AI must not invent: prices, quantities, scope, dates, contacts, results. Missing information gets a placeholder instead of a guess. That one habit is what makes the output safe to use.

THE MOVE

**LOOK FOR ONE TASK
YOU CAN USE MONDAY.**

FIND REVENUE

01

Find opportunities and choose the next move. Work often becomes visible long before anyone sends you an invitation to bid.

WHERE WORK SHOWS UP FIRST

BID PLATFORMS

PUBLIC
PROJECTSPERMITS &
PLANNINGEXPANSION
NEWSRECOMMENDATION
REQUESTSCONTRACTOR
DIRECTORIES

Sometimes the best opportunity is not bidding yet. A permit, a planning agenda, an expansion announcement or a property sale can tell you work may be coming. AI can search and organize these public signals so you can start building the relationship before everyone else sees the bid. Notice what this prompt does: it says who AI is helping, what you sell, where you work, which sources to search, and how to organize the answer. It also tells AI to label its assumptions.

PROMPT 01 · OPPORTUNITY RESEARCH

COPY, PASTE, ADJUST

Act as a business development researcher for a commercial mechanical insulation contractor.

Find current, publicly available project opportunities and early indicators of future work in **[YOUR STATES OR SERVICE AREA]**.

Focus on projects where mechanical insulation, HVAC insulation, piping insulation, duct insulation, industrial insulation, or related services may reasonably be needed.

Search for:

- Active public bids, RFPs, and RFQs
- School, university, and hospital construction or renovation projects
- Manufacturing, food processing, and industrial expansions
- Government building and infrastructure projects
- Planning commission agendas, development applications, permits, and meeting minutes
- Public announcements involving new facilities, additions, HVAC upgrades, or major renovations
- Publicly visible contractor or subcontractor requests
- Relevant opportunities listed on construction bid platforms

Separate the results into:

- A. READY TO PURSUE: Projects that are bidding, accepting qualifications, or have an identified public contact.
- B. EARLY OPPORTUNITY SIGNALS: Projects that have been announced, approved, permitted, or entered planning but may not yet be bidding.

For every result, provide:

Project or company name; city and state; type of project; current stage; why it may need mechanical insulation; relevant date or deadline; public contact or agency; link to the original public source; recommended next step.

Only include opportunities supported by a public source. Clearly label any conclusion that is an inference. Do not invent projects, dates, contacts, deadlines, or scope.

Prioritize the ten strongest opportunities. Put the results in a table and rank them based on how actionable they appear.

AI SEARCHED. YOU DECIDE WHAT IS WORTH PURSUING.

A list does not create revenue. The next action does. AI shortens the search, but it does not replace your judgment or the need to verify the scope. Before you act on any result:

- 01** Open the original solicitation. Read the public source yourself, not the summary.
- 02** Confirm insulation is in the scope. If AI labeled the fit as an inference, treat it as a question, not a fact.
- 03** Check eligibility and deadlines. Prequalification, bonding, registration and due dates.
- 04** Contact the agency or prepare the response. Follow the solicitation's communication rules.

73%

of B2B buyers actively avoid suppliers who send irrelevant outreach.

A specific project. A relevant message. A clear next step.

Source: Gartner, 2025 survey of 632 B2B buyers

PROMPT 02 · FIRST-CONTACT EMAIL**COPY, PASTE, ADJUST**

Using the verified public opportunity below, draft a concise first-contact email.

The email should:

- Reference the specific project
- Briefly explain why our company may be relevant
- Ask one or two intelligent questions
- Give the recipient an easy next step
- Sound professional and natural
- Avoid exaggerated sales language

Do not invent facts, relationships, qualifications, deadlines, or project details. If important information is missing, use a clearly labeled placeholder.

Opportunity information:

[PASTE THE VERIFIED PROJECT INFORMATION HERE]

Our company:

Company name: **[COMPANY NAME]** · Services: **[SERVICES]** · Service area: **[SERVICE AREA]** · Relevant experience: **[RELEVANT EXPERIENCE]** · Sender's name: **[NAME]** · Phone: **[PHONE]**

Provide:

A clear subject line; the finished email; any information that should be verified before the email is sent.

THE MOVE

ONE OPPORTUNITY. ONE NEXT MOVE.

This is not a generic sales message. It references the actual project and asks one question the recipient can answer. Before you send it, confirm the project details, edit the language, add your signature and follow the solicitation's communication rules.

ASK YOUR TEAM

- 01** Where does work in our market become public before it goes to bid?
- 02** Which three opportunities from this week's search are worth a phone call?
- 03** Who owns the follow-up, and by when?

WIN WORK

Turn a customer request into a useful response. When a customer is ready to buy, speed matters, but so does the quality of the answer.

02

YOUR RESPONSE IS PART OF THE FIRST IMPRESSION

"If I have to follow up twice, I eliminate you from consideration."

One industrial purchasing decision-maker. Source: Thomas, 2021 survey of more than 400 industrial buyers

How fast does your company answer a new request? Within an hour, the same day, a few days, or does it depend on who sees it? The opportunity is not only writing faster. It is a process where every good inquiry gets a consistent response, even when everyone is busy.

WHAT DO YOU NEED TO KNOW BEFORE YOU CAN PRICE IT?

- Facility size and exact scope
- Drawings and specifications
- Pipe, duct or equipment details
- Materials and insulation requirements
- Project schedule
- Site conditions
- Bid deadline
- Decision-maker
- Opportunity for a site visit

PROMPT 03 · WHAT DO WE NEED?

COPY, PASTE, ADJUST

Act as an experienced estimator and customer service manager for a commercial mechanical insulation contractor. Review the customer's quote request below.

FIRST, IDENTIFY:

- Information missing from the request
- Questions required before pricing the work
- Anything that needs a drawing, specification, site visit, or company decision

THEN, DRAFT:

- A professional customer response
- Clear questions in a logical order
- A simple next step, such as a call or site visit

Do not invent scope, quantities, materials, pricing, availability, or deadlines. Keep the response helpful and concise.

CUSTOMER REQUEST:

[PASTE THE EMAIL HERE]

THE MOVE

**ACKNOWLEDGE THE REQUEST. ASK WHAT IS MISSING.
SET THE NEXT STEP.**

AI finds the gaps. Your team confirms the job. The response it drafts never guesses the scope or builds a price from incomplete information, so you can edit, send and move the opportunity forward without starting from a blank page.

Once the customer answers your questions, you have approved information to work with. Upload your logo, the approved scope, pricing and terms, and ask AI to build the finished quote. It formats and packages the information. It does not decide your price, terms, scope or technical requirements.

PROMPT 04 · BUILD THE QUOTE

COPY, PASTE, ADJUST

Using the approved information and company branding provided, create a professional customer quote. Use only the information contained in the uploaded files and the approved details below.

Include:

- Company logo, colors, and contact information
- Customer and project information
- Quote number and date
- Clear description of the base scope
- Approved quantities and pricing
- Clearly labeled optional add-ons

- Assumptions and exclusions
- Estimated schedule or timing
- Payment terms
- Quote expiration date
- Customer approval and signature section

Do not calculate, change, estimate, or invent pricing, quantities, technical requirements, scope, contract language, company capabilities, or schedule commitments. If required information is missing, insert a clearly labeled placeholder rather than making an assumption.

Approved project information:
Customer: [CUSTOMER NAME] · Project: [PROJECT NAME] · Location: [LOCATION] · Base scope: [APPROVED SCOPE] · Base price: [APPROVED PRICE] · Optional add-ons: [APPROVED OPTIONS AND PRICES] · Schedule: [APPROVED SCHEDULE] · Payment terms: [APPROVED TERMS] · Quote expiration: [EXPIRATION DATE] · Assumptions: [APPROVED ASSUMPTIONS] · Exclusions: [APPROVED EXCLUSIONS]

Create the finished quote as a polished PDF that is ready for company review.

WHAT ELSE COULD THIS CUSTOMER NEED?

Once the base scope is clear, make useful options visible. The goal is not to hide charges or push something they do not need. Ask AI for ideas, then keep only what genuinely helps:

UPGRADED MATERIALS

PROTECTIVE JACKETING

ENERGY-EFFICIENCY REVIEW

INSPECTION & REPORTING

REPAIR OR MAINTENANCE PLAN

EXPEDITED SCHEDULING

EXTENDED WARRANTY

FUTURE-PHASE PRICING

Every add-on should be optional, clearly priced and approved by the company before it reaches the customer.

THE PICTURE · ONE REQUEST, SIX OUTPUTS

One short customer email became clarifying questions, a customer response, a project scope, a branded quote, optional add-ons and a follow-up email, all in one sitting. How long would that normally take your company? The return is not that AI wrote an email. It is the whole workflow moving forward at once.

STRENGTHEN YOUR WEBSITE

03

Help customers understand your business and take the next step. Finding opportunities is only half the equation. Can the right customer find you?

AUDIT WHERE YOUR COMPANY APPEARS

LOCAL CUSTOMERS

- ☐ Google Business Profile
- ☐ Bing Places
- ☐ Apple Business Connect
- ☐ Yelp
- ☐ Nextdoor

GENERAL CONTRACTORS & OWNERS

- ☐ The Blue Book
- ☐ ConstructConnect
- ☐ PlanHub
- ☐ BuildingConnected
- ☐ Local builders exchanges
- ☐ Trade association directories

THE 60-SECOND TEST

Take out your phone. Search for the main service your company provides plus the city you serve. Does your company appear? What does a customer see first? Can they easily request a quote? Being listed is only the first step. Proof is what gets you called.

PROMPT 05 · ONLINE PRESENCE AUDIT

COPY, PASTE, ADJUST

Act as a prospective customer searching for the service and company below.

Service being searched: **[SERVICE]** · City or service area: **[LOCATION]** · Company name: **[COMPANY NAME]** · Company website: **[WEBSITE]**

Review the company's publicly available online presence, including its website, business listings, contractor directories, and relevant social profiles.

Evaluate:

- Whether the company appears when searching for the service and location
- Whether its services and service area are immediately clear
- Whether customers can see recent projects or examples of completed work
- Whether testimonials, reviews, qualifications, or other proof are visible
- Whether company information is complete and consistent
- Whether requesting a quote or contacting the company is easy
- What might cause a potential customer to leave or choose another company

Provide:

What the company is doing well; what is difficult to find; the three highest-value improvements; the first improvement the company should make; a simple explanation of why that improvement could help generate more qualified inquiries.

Use only publicly available information. Do not invent reviews, rankings, services, qualifications, or business details.

73%

of industrial buyers paid close attention to a supplier's website when evaluating them.

Can they see what you do, why to trust you, and how to reach you?

Source: Thomas, 2019 survey of 266 industrial buyers

WHAT CUSTOMERS NEED TO SEE BEFORE THEY CALL

- Work similar to theirs
- Project photos
- Testimonials and reviews
- Clear services
- Experience and qualifications
- Industries served
- An easy way to request a quote

THE 10-SECOND WEBSITE TEST

Look at your homepage as if you know nothing about the company. Can you tell:

- 01** What they do?
- 02** Who they serve?
- 03** Why you should trust them?
- 04** What you should do next?

Most companies already have this proof. The problem is that customers cannot always find it. Ask AI to review the site like a customer, not like a web designer, and to rank only five improvements. That forces it to prioritize business value.

PROMPT 06 · REVIEW IT LIKE A CUSTOMER

COPY, PASTE, ADJUST

Act as a prospective customer looking for a commercial contractor. Review this website from the customer's point of view: **[WEBSITE]**

Answer:

- What does this company do?
- Who does it serve?
- What proof makes the company credible?
- What important information is difficult to understand or find?
- Is the next step for a potential customer obvious?
- What might cause a qualified customer to leave without contacting the company?

Then identify the five improvements most likely to increase qualified customer inquiries. For each recommendation, provide: what should change; where the change should appear; why it matters to the customer; the expected business value; the easiest first action; priority level: high, medium, or low.

Rank the recommendations from highest to lowest business value.

Use only information visible on the website. Do not invent services, locations, projects, testimonials, qualifications, reviews, statistics, or customer results.

Focus on practical improvements the company could begin making this week. Do not recommend a complete website redesign unless the available evidence clearly supports it.

ASK YOUR TEAM

- 01** What surprised you about what a customer could or could not find?
- 02** What information was hardest to locate?
- 03** If this were our company, what would we improve first?

WHAT A GOOD RESULT LOOKS LIKE

In the workshop, AI did not return fifty random website changes. It ranked five actions by their likely business value:

#	RECOMMENDATION	PRIORITY
1	Add a clear homepage headline and a quote button to the first screen	HIGH
2	Show completed projects	HIGH
3	Put proof next to the claims	HIGH
4	Make local pages easier to find	MEDIUM
5	Repeat the quote action after proof	MEDIUM

Then take the top recommendation and have AI create it instead of only recommending it. Do not ask for a whole new website. Give it one job, improving the first screen, and hand it verified facts so it has useful material without inventing claims.

PROMPT 07 · REWRITE THE FIRST SCREEN

COPY, PASTE, ADJUST

Rewrite only the first screen of this contractor's homepage.

The customer should immediately understand:

- What the company does

- Why the company is credible

- Who it serves

- What the customer should do next

Use only these verified company facts:

Company name: [COMPANY NAME] · Type of contractor: [E.G. INDUSTRIAL AND COMMERCIAL SPECIALTY CONTRACTOR] · Services: [SERVICES] · In business since: [YEAR] · Team size: [NUMBER OF FIELD EMPLOYEES] · Locations: [LOCATIONS]

Create:

- One clear homepage headline

- One secondary call-to-action

- One supporting sentence

- One short credibility line

- One primary call-to-action button

Use plain language that a prospective customer can understand immediately. Do not invent projects, customers, testimonials, statistics, certifications, guarantees, service locations, or results.

Provide three options. Rank them from strongest to weakest and explain why the first option is most likely to help a qualified customer take the next step.

THE MOVE

TAKE 30 SECONDS.
SHARE ONE IMPROVEMENT.

The goal is not a prettier website. It is more qualified inquiries. Your website team still reviews the wording and makes the change; AI just removes the blank page.

CREATE MARKETING

Turn one completed project into useful content. Most companies do not have a content problem. They have photos, field notes and finished work sitting in a folder.

04

95%

of B2B purchases went to a vendor on the buyer's Day One shortlist.

Be known before they need you. Show your work and make your capabilities easy to remember.

Source: 6sense, 2025 B2B Buyer Experience Report

Think of one completed project from the last six months that customers should know about. Every piece below uses the same approved facts, but each one should fit where it lives. A website project page needs detail. A Google Business post should be short and local. A customer email should feel useful, not promotional. The rules protect you from publishing an invented result, a customer quote, or a confidential project name.

PROMPT 08 · ONE PROJECT INTO FIVE

COPY, PASTE, ADJUST

Act as a marketing writer for a commercial contractor. Using the approved project information below, create five finished marketing pieces: **website project page**; **Google Business Profile post**; **LinkedIn company post**; **customer email**; **one-page sales sheet**.

For each item:

- Match the length and style to where it will be used
- Explain the customer's problem when that information is provided
- Describe the work completed using plain language
- Highlight only verified results
- Include a clear and appropriate next step
- Avoid exaggerated or generic sales language

Rules:

- Use only the approved information provided
- Do not invent savings, results, dates, quantities, materials, scope, technical details, or customer quotes
- Do not name the customer unless permission is clearly stated
- Do not identify a confidential project location
- Mark missing information with [INFORMATION NEEDED]
- If a customer comment cannot be published, omit it

Approved project information:

Company: [COMPANY NAME] · Project type: [PROJECT TYPE] · General location: [CITY, STATE OR REGION] · Customer name approved for use: [YES/NO] · Customer problem: [PROBLEM] · Work completed: [VERIFIED SCOPE] · Materials or systems involved: [VERIFIED DETAILS] · Project date: [DATE OR OMIT] · Verified result: [RESULT OR INFORMATION NEEDED] · Customer comment approved for use: [COMMENT OR NONE] · Photos approved for use: [YES/NO] · Desired next step: [REQUEST A QUOTE / VIEW SERVICES / CONTACT US]

Organize the response into five clearly labeled sections. After drafting, provide a final checklist of facts that someone from the company should verify before publishing.

THE MOVE

STOP STARTING FROM ZERO.

The facts still come from your team. AI packages them for different places, so one approved project keeps working long after the job is finished.

ONE PROJECT, FIVE FINISHED PIECES

01	WEBSITE PROJECT PAGE	Detail and long-term proof that keeps working after the job is done.
02	GOOGLE BUSINESS POST	Short and local. Helps you show up when nearby customers search.
03	LINKEDIN COMPANY POST	Shows general contractors, owners and future hires what you are working on.
04	CUSTOMER EMAIL	Gives past customers a useful reason to reconnect.
05	ONE-PAGE SALES SHEET	Something polished the sales team can hand over or attach.

The facts stay the same. Only the format and the amount of information change.

PUT IT ON THE CALENDAR

Content does not help if it sits in a folder. A scheduling tool like Metricool lets you place approved posts on a calendar and publish them across connected platforms automatically. The goal is not to post constantly. It is to batch useful content, approve it once, and stay visible when the week gets busy.

SCHEDULE ONE POST IN SEVEN STEPS

- 01 Open the planner
- 02 Create one new post
- 03 Add the project photo and approved copy
- 04 Select the correct platform
- 05 Choose a date and time
- 06 Preview the post
- 07 Save it as a draft or schedule it

THE MONTHLY ROUTINE

- 1 - REVIEW THE CONTENT
- 2 - CHOOSE THE DATES
- 3 - CHECK WHAT PERFORMED

EXAMPLE TWO-WEEK CALENDAR

WEEK	TUE	THU	SAT
1	Project highlight · Google Business	Project update · LinkedIn	Open
2	Customer question · Facebook	Service spotlight · LinkedIn	Project follow-up · Facebook

ASK YOUR TEAM

- 01 Which finished job from the last six months should customers know about?
- 02 Who can approve the facts, photos and customer name?
- 03 Who owns the calendar each month?

ORGANIZE OPERATIONS

Turn scattered information into clear next steps. One update is in an email, another is handwritten, someone sends a text, and the meeting creates another set of notes.

05

AI can bring those pieces together into something the team can use. It can identify actions, draft the follow-up and organize information for a change order. The team still confirms what happened, who owns the work, the deadline, the contractual responsibility, and anything involving price. The guardrails matter most here: AI should never assign work to someone who did not accept it, or create a deadline nobody agreed to.

PROMPT 09 · MEETING NOTES TO ACTIONS

COPY, PASTE, ADJUST

Turn these meeting notes into a clear action list.

For each action, include:

- Task
- Owner
- Due date
- Current status
- Information still needed

Also identify:

- Decisions made
- Unanswered questions
- Risks or delays mentioned
- Items requiring customer follow-up

Rules:

- Do not assign an owner unless the meeting names one
- Do not create a deadline unless one was stated
- Mark missing owners or deadlines as NOT ASSIGNED

- Keep confirmed decisions separate from proposed ideas
- Do not invent commitments, approvals, or project details
- Flag any statement that is unclear or may need verification

Meeting notes:

[PASTE MEETING NOTES OR TRANSCRIPT HERE]

WHAT A GOOD RESULT LOOKS LIKE

From the workshop's sample coordination meeting. The most valuable part is in red: AI exposed the gaps instead of quietly filling them.

TASK	OWNER	DUE	STATUS
Confirm equipment delivery date with supplier	Maria	Apr 15	Open
Schedule the crane	Jake	Apr 16	Open
Get roof penetration details from architect	NOT ASSIGNED	NOT ASSIGNED	Blocked
Monitor weather and give an update	Sam	Friday	Open
Answer customer on Area B start date	NOT ASSIGNED	NOT ASSIGNED	Pending

How many meetings end with everyone believing someone else owns the follow-up?

This is not asking AI to approve a change order. It is asking AI to organize the record while the details are fresh. Missing information stays visibly marked until the right person fills it in.

Field team provides the facts	Estimator confirms cost	Project manager reviews contract and schedule	Authorized people approve the final document
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PROMPT 10 · CHANGE-ORDER DRAFT

COPY, PASTE, ADJUST

Using the approved field notes, customer request, photos, and contract information below, create an internal change-order draft.

Include:

- Project and date
- Who requested the change
- Original scope
- Requested change
- Reason for the change
- Labor, material, and equipment information provided
- Possible schedule impact
- Supporting photos or documents
- Information still needed
- Internal review and customer approval fields

Rules:

- Do not decide who is responsible
- Do not determine contract entitlement
- Do not calculate or invent pricing
- Do not promise a completion date
- Mark missing information as TO BE CONFIRMED
- Clearly separate verified facts from assumptions
- Identify any information that should be checked against the contract
- Label the document INTERNAL DRAFT

Project information:

Project: [PROJECT] · Date reported: [DATE] · Requested by: [NAME AND ROLE] · Request received by: [EMAIL / PHONE / IN PERSON] · Original scope: [ORIGINAL SCOPE] · Requested change: [REQUESTED CHANGE] · Reason given: [REASON] · Work started: [YES/NO] · Material and insulation thickness: [DETAILS OR TO BE CONFIRMED] · Labor required: [OR TO BE CONFIRMED] · Equipment required: [OR TO BE CONFIRMED] · Price: [OR TO BE CONFIRMED] · Schedule impact: [OR TO BE CONFIRMED] · Supporting documentation: [EMAILS, PHOTOS] · Additional field notes: [NOTES]

Create the draft in a clean format that can be reviewed by the project manager and estimator before anything is sent to the customer.

THE PICTURE · WHAT IT DID NOT DO

In the workshop example, AI turned scattered field notes about 60 feet of added chilled-water piping into a draft the team could actually review. It did not invent pricing, assign responsibility, approve the work or promise a schedule. How much time would that save your project manager, and how many disputes could a cleaner record prevent?

THE MOVE

THE RECORD IS ORGANIZED.
THE DECISIONS STILL BELONG TO THE TEAM.

Write the draft while the details are fresh, then route it through the same review you use today.

Once the work, pricing and terms are approved, AI can turn those details and your logo into a professional invoice or quote in minutes.

It can include itemized pricing, payment terms, exclusions and signature lines. The key is that AI formats approved information. It does not determine the numbers.

PROMPT 11 · BRANDED INVOICE

COPY, PASTE, ADJUST

Create a professional branded invoice using the approved information below.

Company: [COMPANY NAME] · Customer: [CUSTOMER NAME] · Project: [PROJECT] · Invoice number: [NUMBER] · Description: [WORK COMPLETED] · Labor: [HOURS x RATE = AMOUNT] · Materials: [AMOUNT] · Equipment: [AMOUNT] · Total due: [TOTAL] · Payment terms: [E.G. NET 30]

Use the attached company logo and match its colors. Create a clean, one-page PDF suitable for sending to a customer.

Include:

- Company and customer information
- Invoice number and date
- Clear description of completed work
- Itemized pricing

- Total amount due
- Payment terms
- A short thank-you message

Do not add, estimate, or change any numbers. Flag anything missing before creating the final invoice. Add "REVIEW BEFORE SENDING" to the draft.

THE WORKSHOP EXAMPLE

LINE ITEM	AMOUNT
Labor · 24 hours at \$150 per hour	\$3,600
Materials	\$2,840
Equipment	\$450
Total due · Net 30	\$6,890

Fictional sample company and pricing, shown only to illustrate the format.

THE MOVE

AI ORGANIZES THE RECORD.
YOUR TEAM MAKES THE DECISIONS.

Use AI to remove the typing, the formatting and the hunting for details. Keep every approval, price and commitment with the people responsible for it.

ASK YOUR TEAM

01

Where does important information usually get lost in our company?

02

Which document do we rebuild from scratch most often?

03

Who reviews it before it reaches a customer?

BUILD REPEATABLE PROCESSES

Capture what your experienced people know. Think about the person everyone calls when something goes wrong. What do they know that is not written down anywhere?

06

It might be a customer preference, a machine setting, a workaround, a safety check, or how a recurring problem gets fixed. That knowledge is valuable, and it is also a risk when it lives with only one person. Experienced employees do not want to write a manual, and they should not have to. Ask them to explain the work the way they would train a new employee, record it or use voice input in your AI assistant, and let AI build the first draft.

QUESTION 1

WHAT DO YOU DO FIRST?

QUESTION 2

WHAT USUALLY GOES WRONG?

QUESTION 3

WHAT SHOULD NEVER BE SKIPPED?

Never record employees without their knowledge. Tell them the purpose, remove confidential customer information, and let them review the finished document.

PROMPT 12 · EXPERIENCE INTO AN SOP

COPY, PASTE, ADJUST

Turn the transcript below into a clear standard operating procedure for a new employee.

Include:

- SOP title
- Purpose
- Who should perform the task
- Tools, materials, and personal protective equipment required
- Step-by-step instructions
- Safety checks
- Quality-control checks
- Common mistakes and how to avoid them
- When to stop and ask a supervisor for help
- A final completion checklist

Use plain language and short steps. Preserve important warnings from the transcript. Do not invent missing steps, requirements, or safety instructions. Mark anything missing or unclear as: NEEDS EXPERT REVIEW

End with a section titled "Questions the Expert Still Needs to Answer."

Transcript:

[PASTE THE EMPLOYEE'S TRANSCRIPT HERE]

Faster onboarding

More consistent work

Fewer repeated questions

Less knowledge lost when someone leaves

Easier process improvement

THE MOVE

TEN MINUTES OF TALKING CAN SAVE YEARS OF KNOWLEDGE.

The expert reviews every step before the team uses it, especially safety. Anything unclear stays marked NEEDS EXPERT REVIEW until they confirm it.

THE GUARDRAILS

AI can organize, draft, identify gaps and suggest options. It should not have the final word when the outcome affects safety, money, employees, contracts or customers.

THE ONE RULE

**IF IT AFFECTS SAFETY, MONEY, PEOPLE OR A CUSTOMER,
A QUALIFIED PERSON REVIEWS IT.**

WHAT AI IS GOOD AT

- Searching and organizing public information
- Drafting from approved facts
- Spotting missing information and asking better questions
- Formatting and branding documents
- Turning one input into several useful outputs
- Suggesting options for a person to choose from

WHAT AI SHOULD NEVER DECIDE

- Prices, quantities and totals
- Scope and technical requirements
- Contract responsibility or entitlement
- Schedule commitments and deadlines
- Who owns a task
- Safety procedures and PPE

FOUR HABITS THAT KEEP IT SAFE

- 01 Do not paste confidential information into an unapproved tool.** Use the AI assistant your company has approved, and strip customer details you do not need.
- 02 Verify names, dates, calculations and claims.** Open the source. Run the numbers. AI is a fast first draft, not a source of truth.
- 03 Keep your existing approval processes.** AI speeds up the work before the approval. It does not replace the approval.
- 04 Never treat AI-generated safety or legal language as automatically correct.** An expert signs off, every time.

THE PICTURE · PLACEHOLDERS ARE A FEATURE

When AI writes NOT ASSIGNED, TO BE CONFIRMED or NEEDS EXPERT REVIEW, it is doing its job. A visible gap tells a manager exactly what still needs a decision. A gap filled with a confident guess is how small mistakes reach customers.

YOUR MONDAY PLAN

Do not leave planning to transform the whole company. Choose one task that happens repeatedly, takes real time, follows a pattern, and can be reviewed by a person.

YOUR FIRST AI TASK PASSES ALL FOUR

- ☐ I do it every week.
- ☐ It takes time I could use elsewhere.
- ☐ I have the information AI needs.
- ☐ I can check the result.

GOOD FIRST CHOICES

- 03** Draft a customer reply to a quote request
- 09** Turn meeting notes into next steps
- 08** Turn a finished project into marketing

WRITE IT DOWN

MONDAY AT _____, I WILL USE AI TO _____

Put the time on your calendar now. Tell one person what you committed to.

TRACK THE TIME IT GIVES BACK

TASK	PROMPT USED	TIME BEFORE	TIME WITH AI	SAVED

1

Choose one repeated task.

2

Use one prompt. Save it once it works.

3

Measure the time saved. Then choose the next task.

KEEP GOING

TAKE BACK YOUR TIME. PUT IT WHERE IT MATTERS.

You do not need to become an AI expert. Choose one repeated task, use one strong prompt, and measure whether it actually saves time. Once the first workflow works, save the prompt and repeat it.

If you want your team to work through its own emails, quotes, documents, marketing and processes together, I bring this hands-on workshop directly into companies. We build the workflows around your actual business, not generic examples.

Bring the workshop to your team. Hands-on, built around your own jobs, quotes and processes.

chrisund.com

The prompt library. All twelve prompts are in this guide, ready to copy into the AI assistant your company has approved.

Connect with Chris. Questions about a prompt or a workflow are always welcome.

linkedin.com/in/christophersund

The book. *You Are Capable of More: A No-Excuses Guide to Becoming Your Best Self.*

youarecapableofmore.com

**TAKE BACK
YOUR TIME**

CHRIS SUND

CHRISSUND.COM