

Plug AI Into the Rest of Your Life

August 18, 2026 | AI Fluency + Productivity

Connect AI to existing tools, review permissions, and use it to reconcile information and produce finished files.

August 18, 2026

With Cheryl Thompson

Who it is for

Professionals, side-business owners, and volunteer leaders managing scattered information

Inside this playbook

15 copyable prompts and practice blocks.

[Open the online playbook](#)

The recorded session

Watch the Learning Lab.

Follow the session, then use the playbook with your own work.

[Watch replay on Vimeo](#) ^[1]

What to take into your work

1. Choose the information AI needs for a specific task.
2. Check connections and permissions before using them.
3. Cross-check information and review finished files.

Use the learning

Your playbook

Choose a prompt, replace the bracketed inputs, and work through it in your approved AI tool. Review the result and adapt it to your situation.

This playbook accompanies the August 18, 2026 session. Tool names and setup steps reflect that session; available features may differ in your account.

Welcome to Your AI Toolkit

Copying and pasting between windows is where most people quit. You find the email, copy it, switch tabs, paste it, go back for the spreadsheet, copy that, and somewhere around the third window you decide it was faster to just do it yourself. Connectors end that. AI reaches into your calendar, your email, and your files, and works there directly. Here is where it gets good: the most powerful version of this is not at work. It is the side business, the volunteer board, the rental, the life admin. The stuff that is actually yours. This playbook gives you the method: how to connect AI to the tools you already use, how to read the permission screen before you click it, and five prompts built around the two things connected AI does that pasted AI cannot: it catches what your tools disagree about, and it hands you back finished files.

- Two of these prompts run in Microsoft Copilot at work, on data that is already inside your company's walls. Safe, approved, Monday-ready.
- Three of them run on your own paid account (Claude, ChatGPT, Gemini), on the parts of your life where you are the IT department and permission is yours to give.
- Every prompt has a main version, an alternate version for free Copilot or tools without connectors, and an example scenario you can paste and run today.

How to Use This Playbook

- **Start with the two Copilot prompts at work.** Your calendar and mailbox are already connected. You are not adding anything, you are finally using what is there.
- **Then connect ONE thing on your personal account.** Not five things. One. Your files folder is the best first connection, and the Permission Screen section below tells you what you are agreeing to.
- **Run the Treasurer Rescue or the Cross-Check on something real.** The volunteer board books, the rental inquiries, the side business quotes. That is where the jaw-drop lives.
- **Keep the wall up.** Work accounts connect to work AI. Personal accounts connect to personal AI. Never cross them. More on this below.
- **Let one thing run on a schedule.** The Sunday Night Brief is the smallest possible taste of AI that works without being asked. Next week's lab builds on that idea.

The Ladder: Paste, Connect, Delegate

Every person using AI is standing on one of three rungs.

Rung	What it looks like	What it costs you
PASTE	You carry information to the AI. Copy, switch windows, paste, repeat.	You quit by the third window. The task stays yours.
CONNECT	AI reaches into your calendar, email, and files and works there.	Five minutes of setup and one honest read of a permission screen.
DELEGATE	AI runs on a schedule and reports back without being asked.	Trust, built one small job at a time.

Last week you gave AI a memory by carrying files to it, upload by upload. This lab is the week the carrying stops. Today is rung two. Next week is rung three.

The Permission Screen, Translated

When you connect anything, a screen appears asking you to grant access. Everyone on earth clicks through it. You are not going to, because it takes 20 seconds to actually read and it is the whole safety story.

- **"Read your files" means read, not touch.** Most connectors are read-only. The AI can look, it cannot delete, move, or send. The connector's own description tells you which one you are granting. Read that line. It is one line.
- **You choose the scope.** Most tools let you connect one folder instead of the whole drive. Do that. Make a folder called AI Workspace, put copies in it, connect that folder. The blast radius of a mistake is now one folder of copies.
- **You can disconnect any time.** Settings, Connectors, disconnect. The key comes back. Nothing is permanent.
- **The wall, and this is the big one:** your work Microsoft account connects to Copilot, because your company approved that pairing and the data never leaves their walls. Your personal accounts connect to your personal paid AI. Never connect a work account to a personal AI tool, and never wire your personal life into your work tenant. Two keyrings. They do not mix.
- **What to never connect, on any account:** banking logins, anything with other people's private data you hold in trust, and anything your employer would need to approve. When in doubt, the paste rung still exists and it still works.

The Connector Directory

What can reach what, as of August 2026. The lists grow monthly, so the real answer is always in your tool under Settings, then Connectors.

Tool	Reaches	Worth knowing
Copilot at work (licensed)	Your Outlook mail, calendar, OneDrive, SharePoint, Teams	Already connected. Nothing to set up. Everything stays inside your company tenant. This is the safest AI you have.
Claude (paid)	Files and folders on your computer via the desktop app, plus a growing connector directory in Settings	The desktop app reading a local folder is the simplest jaw-drop available: no connector setup at all. Claude also creates real Excel, Word, and PowerPoint files, and runs scheduled tasks too.
ChatGPT (paid)	Google Drive, OneDrive, SharePoint, Gmail, Outlook, calendars, and more	Connector availability varies by plan. Scheduled tasks live here too.
Gemini (paid)	The Google side of your life: Gmail, Google Drive, Google Calendar, Docs	If your personal life runs on Google, this is your shortest path. Scheduled actions (Gemini's name for scheduled tasks) are on paid plans too.
Copilot Free	Nothing. No connectors.	The paste prompts in this playbook exist for exactly this. The method still works, you carry the data.

Key Prompts from This Lab

1 The Week Ahead X-Ray (Copilot, work-safe)

Your calendar is already connected to Copilot. This prompt turns it from a wall of blocks into a briefing: conflicts, prep gaps, and where your focus time actually is.

Main Version (Licensed Copilot / any tool with calendar access)

PROMPT TO COPY

ROLE:

You are a seasoned executive assistant who has managed calendars for operations leaders for years. You protect focus time like it is money, you see conflicts before they happen, and you know that a week full of meetings with no prep time is a week that fails quietly.

CONTEXT:

You have access to my connected calendar. Work only from actual calendar entries, never from assumptions. I want to walk into the week already knowing where the pressure points are.

REQUEST:

Important: Do not generate any output until I have answered the questions in the QUESTION section below. If I paste this prompt without answers, your only response should be the clarifying questions.

Produce a week-ahead briefing with these five sections:

1. Conflicts: entries that overlap or leave no transition time between them.
2. Prep radar: meetings that clearly need preparation, each with a suggested prep block that actually fits in the open space on the calendar.
3. Focus map: open blocks of 45 minutes or longer, and which single block to guard hardest given my priorities.
4. Load balance: the most overloaded day, and one thing that could realistically move.
5. One thing I did not ask about: something you noticed on the calendar that I probably missed.

Do not invent calendar entries, attendees, times, or locations. If an entry is ambiguous, flag it as [CHECK THIS] instead of guessing what it is. Keep every date, time, and event name exactly consistent with the calendar.

QUESTION:

1. Which week should I analyze?
2. What are your top one to three priorities that week, so I know what the calendar should be serving?
3. Is anything unmovable that I should treat as fixed (standing meetings, personal commitments)?

Ask me all of these at once in a single numbered list, then wait for my answers before producing any output. Do not answer them yourself and do not start drafting while you wait. When I respond, accept my answers even if I write them as a paragraph, answer out of order, or cover several questions in one sentence. Do not re-ask the list. Proceed with whatever I give you. If a question is unanswered or unclear and the answer would meaningfully change the output, ask ONE short follow-up about only that gap. Otherwise, generate the briefing and note any assumptions you made.

Alternate Version (Copilot Free / no calendar access)

PROMPT TO COPY

ROLE: You are an experienced executive assistant reviewing my week.

MY DETAILS:

- Week: [WEEK YOU ARE PLANNING]
- My calendar, pasted: [PASTE YOUR WEEK: DAY, TIME, EVENT NAME FOR EACH ENTRY]
- Top priorities this week: [ONE TO THREE PRIORITIES]
- Unmovable items: [STANDING MEETINGS OR COMMITMENTS, IF ANY]

STOP. Check the bracketed details above. If any are empty or vague, ask me for them in one numbered list and wait. Accept narrative answers. Do not re-ask. Proceed even if some details are unclear and note any assumptions.

REQUEST: From my pasted calendar only, give me: conflicts and overlaps, meetings that need prep with suggested prep times that fit my open space, my open blocks of 45 minutes or more and which one to guard, the most overloaded day with one thing that could move, and one thing you noticed that I did not ask about. Do not invent any entries. Flag ambiguous items as [CHECK THIS].

Example Scenario: The Program Manager's Week

EXAMPLE TO COPY

Analyze the week of September 21. My top priorities are the Gamma program launch readiness review on Friday and getting the open tooling purchase order closed before month end. Fixed items: Monday 8:00 AM plant walk and Thursday 4:00 PM shift handoff, those never move.

My calendar that week:

Monday: 8:00-8:45 AM plant walk; 9:00-10:00 Gamma core team; 1:00-2:00 supplier call, Ohio stamping; 3:00-3:30 open PO review with purchasing.

Tuesday: 9:00-11:00 quality review, all program managers; 10:30-11:30 HR benefits briefing; 2:00-3:00 tooling PO review with the supplier's account manager.

Wednesday: morning open; 1:00-4:00 customer visit prep with the plant quality manager.

Thursday: 8:00 AM-12:00 PM customer visit, OEM supplier quality engineer on site; 1:00-2:00 lunch debrief; 4:00-4:30 shift handoff.

Friday: 9:00-11:00 Gamma launch readiness review; 1:00-1:30 one-on-one with the plant manager; 2:00-2:30 weekly report writing.

2 The Email Archaeologist (Copilot, work-safe)

Somewhere in your mailbox is a thread where somebody promised something. This prompt digs it up and puts every commitment in a table, with who, what, and when.

Main Version (Licensed Copilot / any tool with mailbox access)

PROMPT TO COPY

ROLE:

You are a meticulous chief of staff who tracks commitments for a living. You know that most dropped balls were never written on any list, they were buried in paragraph four of an email everyone skimmed. You find them.

CONTEXT:

You have access to my connected mailbox. Work only from actual emails you find there. The goal is a commitment record I can act on: what was promised, by whom, by when, and what is still open.

REQUEST:

Important: Do not generate any output until I have answered the questions in the QUESTION section below. If I paste this prompt without answers, your only response should be the clarifying questions.

From the emails matching my search, produce:

1. A commitments table: who committed, what exactly they committed to, the due date, and which email it came from (sender, subject, date).
2. Status: which commitments appear to be completed based on later emails, and which are still open.
3. At risk: the single open commitment closest to its deadline or most likely to slip, with one sentence on why.
4. Unclaimed items: anything the thread says needs doing that nobody explicitly owns.

Quote commitments in the sender's actual words where it matters. Never invent senders, dates, amounts, or quotes. If you cannot find an email matching my description, say NOT FOUND and tell me what you searched, do not improvise a plausible answer. Keep names and dates consistent with the source emails exactly.

QUESTION:

1. What topic, project, or thread should I dig into? Give me keywords, sender names, or a subject line, whatever you remember.
2. Roughly what time window (last two weeks, since June, all year)?
3. Whose commitments matter most here: yours, someone specific, or everyone's?

Ask me all of these at once in a single numbered list, then wait for my answers before producing any output. Do not answer them yourself and do not start drafting while you wait. When I respond, accept my answers even if I write them as a paragraph, answer out of order, or cover several questions in one sentence. Do not re-ask the list. Proceed with

PROMPT TO COPY

whatever I give you. If a question is unanswered or unclear and the answer would meaningfully change the output, ask ONE short follow-up about only that gap. Otherwise, generate the output and note any assumptions you made.

Alternate Version (Copilot Free / no mailbox access)**PROMPT TO COPY**

ROLE: You are a meticulous chief of staff who finds the commitments buried in email threads.

MY DETAILS:

- The thread, pasted: [PASTE THE FULL EMAIL THREAD, OLDEST TO NEWEST IF YOU CAN]
- Whose commitments matter most: [MINE / A SPECIFIC PERSON / EVERYONE]

STOP. Check the bracketed details above. If any are empty or vague, ask me for them in one numbered list and wait. Accept narrative answers. Do not re-ask. Proceed even if some details are unclear and note any assumptions.

REQUEST: From the pasted thread only, build a commitments table (who, what exactly, due date, which message it came from), mark each commitment open or completed based on later messages, name the one most at risk and why in one sentence, and list anything that needs doing that nobody explicitly owns. Quote actual words where the wording matters. Never invent names, dates, or amounts. If something is unclear, flag it as [UNCLEAR IN THREAD].

Example Scenario: The Supplier Promise Hunt**EXAMPLE TO COPY**

Whose commitments matter most: the supplier's, but flag mine too. Here is the thread, oldest first.

From: Dave Kaminski (supplier quality manager, Apex Fasteners). Sent: July 28. Subject: SCAR 26-118 containment plan. "Team, confirming what we agreed on today's call. Apex will have 100 percent sort in place at our dock by end of shift Wednesday July 29. Certified stock ships Friday July 31. Our 8D with root cause is due to you August 21. Marie will send the interim inspection data every Tuesday until this closes."

From: me. Sent: July 29. Subject: RE: SCAR 26-118 containment plan. "Dave, confirmed on our side. I committed to getting you the returned parts from our line by August 4 so your team can do the teardown. Also, our SQE needs your updated control plan before the 8D, can you get that to us by August 14?"

EXAMPLE TO COPY

From: Dave Kaminski. Sent: July 30. Subject: RE: SCAR 26-118 containment plan. "Parts received timeline works. On the control plan, I need to check with our engineering lead, she is out until August 10. Will confirm when she is back. Sort is live as of 3 PM yesterday, certified stock still on track for Friday."

From: Marie Santos (Apex quality tech). Sent: August 4. Subject: Week 1 inspection data. "Attached. 4,120 pieces sorted, 6 rejects found, all contained. Next report Tuesday."

3 The Treasurer Rescue (personal paid account, the star)

Somebody hands you the books: a bank export, a tracker, a budget, none of them agreeing. This prompt reconciles all of it and hands back a board-ready spreadsheet with a Needs Attention tab. Built for the volunteer board, works exactly the same on a department budget.

Main Version (Claude / ChatGPT / Gemini, pointed at your files)**PROMPT TO COPY****ROLE:**

You are an experienced volunteer-organization treasurer and bookkeeper. You have untangled messy handoffs before: bank exports that do not match trackers, budgets typed from memory, cash counts that never met a deposit slip. You are calm about it, systematic, and you never paper over a discrepancy to make the numbers look clean.

CONTEXT:

I am going to point you at a set of financial files (a bank or ledger export, plus supporting documents like a sponsor or dues tracker, a budget, or meeting minutes). They were kept by different hands at different times, so they will not fully agree. Your job is to reconcile them honestly and produce something I can stand behind in front of other people.

REQUEST:

Important: Do not generate any output until I have answered the questions in the QUESTION section below. If I paste this prompt without answers, your only response should be the clarifying questions.

Read every file I point you to, then produce a financial report as an actual spreadsheet file (.xlsx) with these tabs:

1. Summary: beginning balance, total income, total expenses, ending balance, and a plain-language paragraph on overall financial health.
2. Transactions: every ledger line, categorized. Do not drop or merge lines.
3. Budget vs Actual: budgeted amounts against what the ledger actually shows, with variances.

PROMPT TO COPY

4. Needs Attention: every discrepancy you found between the files. For each one: what the mismatch is, the evidence from BOTH sources (file name, date, amount), the dollar impact, and a recommended action.

Rules that are not optional: never invent, round, or adjust a transaction, amount, date, or payee. Every number in your report must trace to a line in my files. A discrepancy is only a discrepancy if you can cite both sides of it. If something is unclear or a file seems incomplete, flag it as [CLARIFICATION NEEDED] instead of guessing. Keep names, dates, and amounts consistent across every tab.

QUESTION:

1. Where are the files? (Point me to the folder or attach them, and tell me what each one is if the names are not obvious.)
2. What period should the report cover?
3. Who is the audience: a board meeting, an auditor or bank, or just you getting oriented? This changes the tone and the level of detail.
4. Any context I should know going in (a treasurer handoff, a specific concern, a deadline)?

Ask me all of these at once in a single numbered list, then wait for my answers before producing any output. Do not answer them yourself and do not start drafting while you wait. When I respond, accept my answers even if I write them as a paragraph, answer out of order, or cover several questions in one sentence. Do not re-ask the list. Proceed with whatever I give you. If a question is unanswered or unclear and the answer would meaningfully change the output, ask ONE short follow-up about only that gap. Otherwise, generate the report and note any assumptions you made.

Alternate Version (Copilot Free / no file access)**PROMPT TO COPY**

ROLE: You are an experienced volunteer-organization treasurer reconciling a messy set of books.

MY DETAILS:

- Ledger or bank export, pasted: [PASTE THE TRANSACTION LINES: DATE, DESCRIPTION, AMOUNT]
- Supporting records, pasted: [PASTE YOUR TRACKER, BUDGET LINES, OR BOTH]
- Period covered: [DATES]
- Audience: [BOARD MEETING / AUDITOR / JUST ME]

STOP. Check the bracketed details above. If any are empty or vague, ask me for them in one numbered list and wait. Accept narrative answers. Do not re-ask. Proceed even if some details are unclear and note any assumptions.

PROMPT TO COPY

REQUEST: Categorize every transaction, total income and expenses, compare against the budget lines I pasted, and list every discrepancy between the ledger and the supporting records with the evidence from both sides and a recommended action. Never invent or adjust a number. Every figure must trace to a line I pasted. Flag anything unclear as [CLARIFICATION NEEDED]. Format the whole thing so I can copy it into a spreadsheet: one section per report tab.

Example Scenario: The Band Boosters Handoff

EXAMPLE TO COPY

I just took over as treasurer of the Northfield High Band Boosters. The outgoing treasurer moved away in June and handed me three things that do not agree. The report covers January through June 2026, and the audience is the board meeting next Thursday. Context: nobody has reconciled anything since March.

Bank export, pasted:

1/10 STORAGE RENTAL SELF-STOR #22, -85.00
1/24 DEPOSIT FRUIT SALE FUNDRAISER, +2,240.00
2/7 MUSIC CITY INSTRUMENT REPAIR INV 4482, -312.00
2/14 DEPOSIT WINTER CONCERT TICKETS, +684.50
3/2 CHARTER COACH DEPOSIT FESTIVAL TRIP INV 2210, -500.00
3/9 CHARTER COACH INV 2210 DEPOSIT, -500.00
3/20 DEPOSIT SPRING CANDY SALE, +1,118.25
4/3 UNIFORM CLEANING BRITE DRY CLEAN, -276.00
4/17 DEPOSIT SPONSOR HENDERSON ORTHODONTICS, +500.00
5/1 FESTIVAL TRIP CHARTER COACH BALANCE, -1,450.00
5/12 GORDON FOOD SVC BANQUET, -389.40
6/2 DEPOSIT BANQUET TICKETS, +920.00
6/15 STORAGE RENTAL SELF-STOR #22, -85.00

Sponsor tracker: Henderson Orthodontics \$500, marked UNPAID, reminder scheduled for July. Riverside Physical Therapy \$250, unpaid, invoiced in May.

Budget actuals typed by the old treasurer: fruit sale \$2,240; winter concert \$684.50; candy sale \$1,290; banquet tickets \$920; charter coach total \$1,950.

4 The Cross-Check (personal paid account)

A customer, guest, or client sends you a message full of claims: the rate you agreed on, the date they booked, the credit they are owed. This prompt drafts your reply AND verifies every claim against your records first. It catches what two different apps disagree about, which is the thing no amount of copy-paste ever does.

Main Version (Claude / ChatGPT / Gemini, with your records available)

PROMPT TO COPY

ROLE:

You are the detail-obsessed operations manager for a small side business. You have seen what happens when a friendly reply confirms a wrong number: the error becomes the agreement. So before anything gets confirmed, you check every claim against the records, and you flag what does not match.

CONTEXT:

I run a small side business and I have an incoming message to answer. I also have records: a rate or price sheet, a booking or job calendar, and a customer history. The message and the records may not agree. Assume nothing in the message is correct until the records confirm it.

REQUEST:

Important: Do not generate any output until I have answered the questions in the QUESTION section below. If I paste this prompt without answers, your only response should be the clarifying questions.

Produce three things, in this order:

1. The cross-check table: every factual claim in the message (rates, dates, availability, credits, policies, promises), what my records actually say, and a verdict for each: MATCHES, MISMATCH, or NOT IN RECORDS.
2. The drafted reply, ready to send, in the tone I select below. The reply must use only record-verified facts, handle any mismatches graciously without blaming the customer, and answer every question they asked. If they asked about something my records do not cover, the reply asks or defers rather than inventing an answer.
3. The fix list: anything the cross-check exposed in MY records or operations that needs correcting, separate from the reply.

Never invent prices, dates, availability, policies, or account balances. If the records do not cover a claim, mark it NOT IN RECORDS and do not confirm it in the reply. Keep every number and date consistent between the table and the reply.

TONE SELECTOR for the reply:

- Warm: a returning customer or guest you want back.
- Professional: a new customer, first contact.
- Firm but kind: an overdue balance or a policy that must hold.

PROMPT TO COPY**QUESTION:**

1. What is the incoming message? (Paste it, or point me to it.)
2. Where are my records, and which file is the source of truth for prices, for the calendar, and for customer history?
3. Which tone from the selector?
4. Is there anything already agreed that my records do NOT reflect yet? (So I do not flag your own handshake deal as an error.)

Ask me all of these at once in a single numbered list, then wait for my answers before producing any output. Do not answer them yourself and do not start drafting while you wait. When I respond, accept my answers even if I write them as a paragraph, answer out of order, or cover several questions in one sentence. Do not re-ask the list. Proceed with whatever I give you. If a question is unanswered or unclear and the answer would meaningfully change the output, ask ONE short follow-up about only that gap. Otherwise, generate all three outputs and note any assumptions you made.

Alternate Version (Copilot Free / everything pasted)**PROMPT TO COPY**

ROLE: You are the detail-obsessed operations manager for my small side business. Verify before you confirm.

MY DETAILS:

- The incoming message, pasted: [PASTE THE CUSTOMER MESSAGE OR THREAD]
- My records, pasted: [PASTE THE RELEVANT LINES FROM YOUR RATE SHEET, CALENDAR, AND CUSTOMER HISTORY]
- Reply tone: [WARM RETURNING CUSTOMER / PROFESSIONAL NEW CUSTOMER / FIRM BUT KIND]
- Anything agreed that my records do not show yet: [NONE, OR DESCRIBE]

STOP. Check the bracketed details above. If any are empty or vague, ask me for them in one numbered list and wait. Accept narrative answers. Do not re-ask. Proceed even if some details are unclear and note any assumptions.

REQUEST: First, a cross-check table: every factual claim in the message versus what my pasted records say, each marked MATCHES, MISMATCH, or NOT IN RECORDS. Second, a ready-to-send reply in my selected tone using only record-verified facts, handling mismatches graciously. Third, a fix list for my own records. Never invent prices, dates, or availability.

Example Scenario: The Pickleball Coach

EXAMPLE TO COPY

I coach pickleball lessons on the side. Tone: warm, she is a returning client. Nothing agreed outside the records.

The incoming message: "Hi coach! Ready to get back at it. Confirming Tuesday 6 PM privates for September, the four-week block at the \$40 per lesson rate from last time. Also I think you still owe me a makeup from that rained-out session in June? And can my sister join for the last two weeks? Venmo incoming once you confirm! - Dana"

My records:

2026 rate sheet: private lesson \$45 per hour (was \$40 in 2025). Semi-private (two players) \$60 per hour split between players. Four-week blocks paid up front. Rain policy: outdoor sessions canceled by me are credited, not refunded.

September court reservations: Tuesdays 6:00-7:00 PM, courts 3 and 4 at Riverside Rec. NOTE: Riverside fall league has courts 1 through 4 reserved starting Tuesday September 8. My standing reservation moves to Thursdays 6:00 PM as of that week, confirmed with the rec desk August 1.

Client history, Dana R.: eight lessons in 2025 at \$40. Spring 2026 block, four lessons at \$45, paid in full. June 9 outdoor session, canceled by me for rain, \$45 credit on account, NOT YET APPLIED. Notes: fast learner, working on third-shot drop.

5 The Sunday Night Brief (personal paid account, the delegate rung)

The first rung of the delegate ladder: a brief that shows up every Sunday evening without being asked. You set it up once. This prompt is the setup.

Main Version (any tool with scheduled or recurring tasks and calendar access)

PROMPT TO COPY

ROLE:

You are my personal chief of staff, and this is a recurring assignment. Every Sunday evening you prepare my week-ahead brief. I do not re-ask each week. You just show up with it.

CONTEXT:

This runs as a scheduled task. You have access to my connected calendar (and, if I confirm below, my email). The brief is read on a phone in under two minutes, usually on a couch. It has to be short, honest, and useful, not a wall of text.

PROMPT TO COPY**REQUEST:**

Important: Do not generate any output until I have answered the questions in the QUESTION section below. If I paste this prompt without answers, your only response should be the clarifying questions. Once I have answered, confirm the schedule back to me in one line, then produce the first brief as a sample.

Every brief contains exactly five parts, under 300 words total:

1. The shape of the week: one honest sentence (heavy, light, front-loaded, one brutal day).
2. Collisions: conflicts, too-tight transitions, or double-bookings. If none, say so in three words.
3. Prep debts: what Monday-morning-me will regret not preparing, with when to do it.
4. Three things not to drop: the week's real priorities, pulled from the calendar and anything I have told you.
5. One thing to shrink or skip: your one candidate to decline, shorten, or delegate, with a one-line reason.

Work only from the connected calendar and any sources I approve below. Never invent events, deadlines, or commitments. If the calendar is ambiguous, flag it as [CHECK THIS] rather than guessing.

QUESTION:

1. What day and time should this arrive? (Default: Sunday 7:00 PM.)
2. Which sources may I read: calendar only, or calendar plus email?
3. Work only, or work and personal together? (If your life runs on two calendars, tell me which.)
4. Anything the brief should always include or never mention?

Ask me all of these at once in a single numbered list, then wait for my answers before producing any output. Do not answer them yourself and do not start drafting while you wait. When I respond, accept my answers even if I write them as a paragraph, answer out of order, or cover several questions in one sentence. Do not re-ask the list. Proceed with whatever I give you. If a question is unanswered or unclear and the answer would meaningfully change the output, ask ONE short follow-up about only that gap. Otherwise, confirm the schedule and generate the first sample brief, noting any assumptions you made.

Alternate Version (Copilot Free / no scheduling: the manual Sunday ritual)

PROMPT TO COPY

ROLE: You are my personal chief of staff giving me a Sunday evening week-ahead brief.

MY DETAILS:

- My week, pasted: [PASTE NEXT WEEK'S CALENDAR: DAY, TIME, EVENT FOR EACH ENTRY]
- Priorities this week: [ONE TO THREE THINGS THAT ACTUALLY MATTER]
- Include personal items: [YES / NO]

STOP. Check the bracketed details above. If any are empty or vague, ask me for them in one numbered list and wait. Accept narrative answers. Do not re-ask. Proceed even if some details are unclear and note any assumptions.

REQUEST: In under 300 words: the shape of the week in one sentence, any collisions or too-tight transitions, the prep I will regret skipping and when to do it, three things not to drop, and one thing to shrink or skip with a one-line reason. Work only from what I pasted. Never invent events. Save this prompt and run it every Sunday until your tool can run it for you.

Example Scenario: The Plant Manager's Sunday

EXAMPLE TO COPY

Set it for Sunday at 7:30 PM. Sources: calendar plus email. Work and personal together, both calendars. Always include: any 5:00 AM or earlier start, flagged loudly, because those change my whole evening before. Never mention: my open-door hour, it is sacred and it is not a candidate to shrink.

For the sample brief, here is next week: Monday 5:30 AM plant opening walk (early start), 9:00 staff meeting, 2:00 corporate safety call. Tuesday 8:00 AM production review, 10:00 interview for the maintenance lead opening, 10:30 vendor walkthrough for the new compressor (yes, those overlap), 6:00 PM my daughter's volleyball scrimmage. Wednesday 9:00-11:00 open, 1:00 quality review, 4:00 one-on-one with my ops manager. Thursday 7:00 AM corporate visitors on site all morning, nothing prepped for it yet, 3:00 budget review with finance. Friday 9:00 open-door hour, 11:00 week close-out, afternoon open. Priorities: the corporate visit has to go well, and I cannot lose the maintenance lead candidate, she has another offer.

What to Wait On

Connectors are a trust ladder, and you do not start at the top rung. Three things this lab deliberately did not connect:

- **QuickBooks and anything that touches money movement.** The read-only ladder first: exports and files this month, live connections when the tool has earned it. A CSV export of your books gives you 90 percent of the value with none of the risk.
- **Banking logins.** Never. Export the statement, work from the file. This is not a technology limit, it is a judgment call that stays right even as the technology improves.
- **Other people's data you hold in trust.** The volunteer board's donor list with personal details, your club's member health forms, anything a member gave the organization and not you. The board should decide that, not one member with a paid account. Knowing what not to connect yet is the operator move. The tools will still be there when trust catches up.

Power Moves

- ☞ : a strong prompt right now, mid-task, without building one from scratch.
- ☞ : done something twice? It builds the reusable version with minimal inputs.
- ☞ : spins up a new workspace for you: custom instructions, knowledge base ideas, and starter prompts.

What to Try This Week

- [] **Run the Week Ahead X-Ray in Copilot tomorrow morning.** Your calendar is already connected. This one costs you nothing and pays immediately.
 - [] **Read one permission screen all the way through.** Open your paid AI tool, go to Settings, then Connectors, and read what one connector actually asks for. Do not even connect it yet. Just read it. You will know more than most people using these tools daily.
 - [] **Make an AI Workspace folder and connect that.** Copies of the files for ONE thing that is yours: the board books, the rental records, the side business quotes. One folder, small blast radius.
 - [] **Run the Treasurer Rescue or the Cross-Check on what is in that folder.** This is the one to actually do. The catch it finds is what makes this real.
 - [] **Set up the Sunday Night Brief.** If your tool schedules, schedule it. If not, run the manual version this Sunday. Either way, next Sunday you have a chief of staff.
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Next Week: The Final Lab of the Series

Four weeks, one ladder. AI built something for you. Then you gave it a memory. Today it reached into your tools. Next week, the top of the series: you stop giving AI instructions and start giving it skills, repeatable jobs it knows how to do your way, every time, without being retaught. It is the difference between a smart assistant and a trained one. August 25, same time.

Closing Thought

Everything in this lab ran on ordinary accounts, the kind anyone can sign up for with a personal email and a credit card. No IT ticket, no approval chain, no waiting for your company to roll something out. The volunteer board got a treasurer, the cottage got a booking manager, and the side business got an operations desk, all before lunch. That is the quiet truth of this moment: at work, someone else decides what AI you get. Everywhere else, you decide. The people who practice on the parts of life they own are the ones who walk into Monday already fluent. Start with the folder. Read the permission screen. Connect one thing.

Related resources

Keep working with the material.

The prompts and exercises are included above. Save a useful prompt and return to it with your next task.

Links and resources

These links are clickable in the PDF. For a paper copy, use the numbered references below.

[1] <https://vimeo.com/1219295670/0183a8e1bc>