

AI for Integrators

From curious to confident in 60 minutes.



THE PROMPT FORMULA

Better input = dramatically better output. Use this every time.



EXAMPLE: POST-CONSULTATION FOLLOW-UP

"You are a high-end home technology consultant. I just met with the Johnsons about a \$120K project. They want Lutron lighting, Sonance speakers, and a Savant system. Write a warm, professional follow-up email — 3 paragraphs max."

AI AS YOUR BUSINESS COACH

Give AI a role and let it coach you. Tell it to be your Sales Process Coach — it will map your current process, diagnose leaks, and build a repeatable system.

"You are my blunt-but-supportive Sales Process Coach. Walk me through mapping my current sales process, comparing it to a smarter model, and designing a clear, repeatable process I can document and train my team on. Ask questions one section at a time. Push me with tough, practical questions."



YOUR 7-DAY AI STARTER PLAN

One small action each day. By Day 7, you'll wonder how you ever worked without it.

- 1 Sign up for Claude or ChatGPT**
Free. Ask one question about your business.
- 2 Write a client email with AI**
Use: Role + Context + Task + Format.
- 3 Try the AI Sales Process Coach**
Let AI interview you and redesign your workflow.
- 4 Draft a proposal or SOW**
Give it details, get a polished first draft.
- 5 Create a Custom GPT or Skill**
Train it once on your voice — use it forever.
- 6 Explore a new AI tool**
Otter.ai, Canva AI, or Perplexity.
- 7 Visit Lovable.dev**
Describe a tool you wish existed. Watch it get built.

THE TOOLS THAT ACTUALLY MATTER

We've tried dozens. These are the ones we use every day.

TOP PICK Claude claude.ai Writing, analysis, reasoning. Cowork automates desktop tasks.	TOP PICK ChatGPT chat.openai.com Most popular AI. Custom GPTs for specialized assistants.
AI ASSISTANT Gemini gemini.google.com Deep Google Workspace integration. Gmail + Docs.	BUILD APPS Lovable lovable.dev Describe an app in English — it builds it. No coding.
BUILD APPS Replit replit.com Build, test & deploy apps in browser. Quick tools.	VOICE ElevenLabs elevenlabs.io AI voice generation for walkthroughs & content.
DESIGN Canva AI canva.com Social media, marketing graphics, presentations.	MEETINGS Otter.ai otter.ai Transcripts, summaries & action items automatically.
RESEARCH Perplexity perplexity.ai AI research with sources. Specs, competitors, intel.	AUTOMATION Zapier AI zapier.com Connect tools with AI workflows. Auto follow-ups.

WHERE ARE YOU ON THE AI MATURITY LADDER?

1 CURIOUS Haven't tried AI yet. That changes today.	Sign up for Claude or ChatGPT
2 EXPERIMENTING Tried AI for emails and brainstorming.	Learn the Prompt Formula
3 INTEGRATING AI is part of your daily workflow.	Build Custom GPTs & Skills
4 BUILDING Creating apps and automations with AI.	Build with Lovable & Replit

You can reach Level 3 in one week.

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