

FREE
FREE AI SETUP KIT
middot; 18 pages

AI Setup Kit

Set up an AI assistant that knows your business, then put it to work on follow-up, quotes and new leads.

Account setup: Claude and Grok paths

Business Brain template

13 starter prompts

Privacy dos and don'ts

First 7 days

Nick Turnbull

GrowthBoost · growthboost.ai

Works with the AI you already use: ChatGPT, Gemini, Claude or Grok.

How to use this kit

This kit is for owners who run the business and the tech, with no IT team. You do not need to be technical. You need a laptop, about an hour for the setup, and 15 to 30 minutes a day for the first week.

It works with whichever AI assistant you already use. ChatGPT, Gemini, Claude and Grok all handle what's in here. The step-by-step setup shows two of them, Claude and Grok, because those are the two Nick uses every day. Pick one and stay with it for the first week.

What's inside

- 1. Account setup.** The settings to get right before you paste in anything about your business, with a Claude path and a Grok path.
- 2. The Business Brain.** A one-page fact sheet your assistant reads before every task, plus a filled-in example and a prompt that interviews you to write it.
- 3. Assistant instructions.** A block of text you paste in once so the assistant works the way you want.
- 4. 13 starter prompts.** Most are about bringing money in: lead response, quotes, follow-up, reviews and referrals. Each one comes with a short check of what a good answer looks like.
- 5. Privacy dos and don'ts.** What's safe to share, what never to paste, and team accounts versus personal ones.
- 6. Your first 7 days.** One small job a day, so the assistant is doing real work by the end of the week.
- 7. When it goes wrong.** Quick fixes for the usual problems.

One rule for the whole kit: the assistant drafts and you decide. Nothing it writes goes to a customer until you've read it.

Set up your account

Choose your assistant

If you already pay for one of these tools and you like it, use that one. If you're starting fresh, try Claude or Grok using the paths below. Both have a free tier you can start on. Both also have paid plans with higher limits and team plans for businesses. Check each company's pricing page for current plans, because they change often.

Before you start: business or personal account?

- **Just you, at first:** a personal account on your work email is fine to start. Turn off the setting that lets the company train on your chats (steps below).
- **Your team will use it too:** use a business or team plan. That gives you one place to control who has access, and business plans generally come with stronger data terms. Read the provider's business terms before you put customer data in.
- **Either way:** sign up with the email you use for the business, not a personal one, so the account stays with the company.

The setup checklist (any assistant)

- ☐ Create the account with your business email.
- ☐ Turn on two-step verification, or sign in with a Google or Microsoft account that already has it on.
- ☐ Find the privacy or data setting and decide whether your chats can be used to train the model. For business use, turn it off.
- ☐ Create a **Project** (some apps call it a Workspace) named after your business.
- ☐ Paste in the assistant instructions from Part 3.
- ☐ Add your Business Brain from Part 2.
- ☐ Run one test prompt from Part 4 and check the answer.

Menu names move around as these apps update. If you can't find a setting, ask the assistant itself: "Where do I set custom instructions in this app?" It will usually tell you.

Path A: Claude

1. Go to **claude.ai** (or download the desktop or phone app) and create an account with your business email.
2. **Privacy:** open **Settings**, then **Privacy**. Find the setting for helping improve Claude and turn it off if you don't want your chats used for training. For a one-off sensitive question, Claude also has an incognito chat option that isn't saved to your history.

3. **About you:** in **Settings**, look for the profile or personal preferences section. Add two or three lines about who you are and how you like answers ("Short answers. Plain language. Ask me before assuming.").
4. **Create a Project:** click **Projects**, then **New project**. Name it after your business, for example "Maple & Main Assistant."
5. **Add instructions:** in the project, open the instructions area and paste the block from Part 3.
6. **Add knowledge:** add your Business Brain to the project as a file or pasted text. Add a price sheet or service list too if you have one.
7. **Test it:** start a new chat inside the project and run Prompt 1 from Part 4.

Always start work chats **inside the project**. A chat started outside it won't have your Business Brain.

Path B: Grok

1. Go to **grok.com** (or download the Grok app) and sign in or create an account with your business email.
2. **Privacy:** open **Settings, then Data Controls**. Find the setting for improving the model and turn it off if you don't want your chats used for training. Grok also offers a private chat option for one-off sensitive questions.
3. **About you:** in **Settings, then Customize**, add custom instructions: who you are, what the business does, and how you like answers.
4. **Create a Project:** in the left sidebar, look for **Projects** (some versions call these **Workspaces**). Create one named after your business. This works best on the web version at grok.com.
5. **Add instructions:** paste the block from Part 3 into the project's instructions.
6. **Add knowledge:** upload your Business Brain and any price sheet or service list to the project.
7. **Test it:** start a new chat inside the project and run Prompt 1 from Part 4.

Other assistants

ChatGPT and Gemini have the same building blocks under different names: custom instructions or personalization, a project or workspace area for files, and a data or privacy setting for training. The Business Brain, the instructions and the prompts in this kit work the same way there.

The Business Brain

The Business Brain is a one- to two-page document with the facts your assistant needs to do work your way. Without it, you get generic answers. With it, the assistant knows what you sell, who you sell to, how you price and how you talk.

Keep it short and factual. Update it every time the assistant gets something wrong.

Fastest way to write it: let the assistant interview you

Paste this into a new chat inside your project:

I run a small business and I want you to help me write a "Business Brain": a short fact sheet you will read before every task.

Interview me. Ask one question at a time, and wait for my answer before asking the next one. Cover: what we sell and how we price it, who our best customers are and who isn't a fit, where our leads come from, how a sale happens step by step, the objections we hear most, how we talk to customers, the rules we never break, and what matters most this quarter.

When we're done, write it up using the template headings I paste next. Keep it under two pages. Use plain language. If I didn't answer something, write [FILL] instead of guessing.

Then paste the template below. Plan on about 20 to 30 minutes of answering.

Business Brain template

BUSINESS BRAIN: [Company name]
Last updated: [date]

1. THE BASICS

- What we do, in one sentence:
- Where we work (service area or market):
- Hours, and how fast we reply to new inquiries:
- Website:

2. WHAT WE SELL

- Main services or products, with typical price range or how we price:
- What's included, and what costs extra:
- Our minimums, fees, deposits or payment terms:
- What we don't do:

3. WHO WE SERVE

- Our best customers look like:
- Customers who aren't a fit (and how we politely say no):
- Why customers pick us over others (in their words, if you have them):

4. HOW WE WIN WORK

- Where leads come from:
- Our sales steps, from first contact to paid:
- How we follow up on a quote, and when:
- Objections we hear most, and how we answer them:

5. HOW WE TALK

- Tone (for example: friendly, direct, no jargon):
- Words and phrases we use:
- Words and phrases we never use:
- How we sign off emails and texts:

6. RULES

- Things we never promise (for example: exact arrival times, pricing without a visit):
- Things that always go to the owner (for example: refunds, complaints, discounts over [X]):
- Anything legal or industry-specific to be careful about:

7. WHO HANDLES WHAT

- Roles on the team and what each one owns (roles only, no personal details):

8. RIGHT NOW

- Our top priority this quarter:
- What we're promoting this month:
- Busy and slow seasons:

Example (a made-up company)

This example is fictional. It shows the level of detail that works. Don't copy the facts, copy the shape.

BUSINESS BRAIN: Maple & Main Plumbing (fictional)

Last updated: October 2026

1. THE BASICS

- We repair and replace residential plumbing: water heaters, leaks, drains, fixtures, sump pumps.
- Service area: our county and the next one over. Outside that, we refer.
- Hours: Mon-Fri 7-5, Sat 8-12. We reply to every web lead the same business day.

2. WHAT WE SELL

- Service calls: flat diagnostic fee, credited to the repair if the customer goes ahead.
- Water heater replacement: quoted after a visit. Price depends on size, fuel type and venting.
- We don't do commercial work or new construction.

3. WHO WE SERVE

- Best customers: homeowners who want it done right the first time and care about a clean job site.
- Not a fit: landlords shopping for the lowest bid on every job.
- Customers say they pick us because we show up when we say and explain the options.

4. HOW WE WIN WORK

- Leads: Google, our website form, referrals, repeat customers.
- Steps: inquiry > callback > visit > written quote > follow-up > job > review request.
- Quote follow-up: day 2 (text), day 5 (email), day 10 (call).
- Common objection: "Another company quoted less." We explain what's included and never badmouth competitors.

5. HOW WE TALK

- Friendly, plain, short. Explain options, don't push.
- Never say "cheap." Say "budget option."
- Sign off: "Thanks, the Maple & Main team"

6. RULES

- Never promise a price before a visit. Never promise an exact arrival time, only a window.
- Discounts, refunds and complaints go to the owner.

7. WHO HANDLES WHAT

- Owner: quotes, pricing, complaints. Office manager: scheduling, invoices. Two service techs.

8. RIGHT NOW

- Priority: follow up on every open quote within 10 days.
- Promoting: fall water heater checkups.
- Busy: winter. Slow: late spring.

Assistant instructions

Paste this into your project's instructions once. Edit the brackets. It tells the assistant how to behave on every task, so you don't have to repeat yourself.

You are the assistant for [Company name]. I'm [your name], the owner.

Before every task, read the Business Brain in this project. Use its facts, prices, rules and tone. If the Business Brain doesn't cover something you need, ask me or write [CHECK] in the draft. Never make up prices, dates, policies, numbers or promises.

How to work with me:

- You draft. I review and send. Never write as if something has already been sent or agreed.
- Write the way we talk (see "How we talk"). Plain language, short sentences, no jargon, no hype.
- Keep emails under 150 words and texts under 300 characters unless I ask for more.
- When I paste in notes, a transcript or a list, ask a clarifying question first if something important is missing.
- Give me one solid draft, not five options, unless I ask for options.
- At the end of each draft, list anything I should double-check.

What matters most: bringing in and keeping revenue. That means fast replies to new leads, steady follow-up on quotes, and keeping past customers coming back.

13 starter prompts

Run these inside your project so the assistant has your Business Brain. Replace anything in [brackets]. Under each prompt, "Good answer" is your quick check. If the draft misses it, tell the assistant what to fix, then add that fix to your Business Brain or instructions so it sticks.

Before you paste customer details, see Part 5. Use first names or initials and leave out anything sensitive.

Respond to leads

1. Reply to a new inquiry

Use when a lead comes in through your website, email or a message.

A new lead just came in. Here's what they sent:
[paste the inquiry, with personal details removed]

Write a reply that thanks them, answers what we can answer from the Business Brain, asks the one or two questions we need to move forward, and offers a clear next step (a call or a visit). Then write a short text-message version.

Good answer: sounds like you, answers their question, asks no more than two questions, ends with one clear next step, and promises nothing your Business Brain doesn't support.

2. Call back a missed call or voicemail

Use when you miss a call and want to reply fast.

I missed a call from a possible customer. Here's the voicemail or what I know: [paste notes].

Write a short text I can send now and a 30-second script for when I call back. Include the one question that tells me if they're a fit.

Good answer: the text is short enough to send as one message, the script is natural to say out loud, and the fit question matches "Who we serve."

3. Qualify a lead before you spend time on it

Use before a visit, demo or long call.

Here's what I know about this lead: [paste notes].

Using "Who we serve" and "Our best customers" in the Business Brain, tell me: is this likely a fit, what's unclear, and the three questions I should ask on the first call. Be direct.

Good answer: a clear yes, no or "not sure yet" with a reason, and questions you'd actually ask.

Quotes and follow-up

4. Turn your notes into a quote or proposal draft

Use after a site visit or sales call.

Here are my notes from a visit with [customer first name]:
[paste notes or a voice memo transcript].

Draft a quote or proposal using our services and pricing approach from the Business Brain. Include: what they need in their words, what we'll do, what's included and not included, price [paste your price or write "leave price as [FILL]"], timeline, and next step. Flag anything I need to confirm.

Good answer: uses your pricing approach, leaves prices you didn't give it as [FILL], lists what's included and what isn't, and flags open questions.

5. Follow up on a quote

Use 2 to 10 days after sending a quote with no answer.

I sent a quote to [first name] on [date] for [job, amount]. No reply yet.
What I know about them: [notes].

Write a three-step follow-up I can send over the next 10 days:
1) a short text, 2) an email that adds something useful (an answer to a likely question or an option), 3) a final check-in that makes it easy to say "not now." No pressure, no fake deadlines.

Good answer: each message is shorter than the last, adds a reason to reply, and the last one leaves the door open politely.

6. Answer a price objection

Use when you hear "that's more than I expected" or "someone else quoted less."

A customer said: "[paste exactly what they said]."

Our quote: [what it includes and the price].

Write a reply that acknowledges the concern, explains what's included in plain words, offers a lower-cost option if the Business Brain allows one, and doesn't badmouth anyone. Keep it short.

Good answer: calm, specific about value, offers an option only if your rules allow it, and never discounts on its own.

7. Bring old quotes and old leads back to life

Use once a month on quotes that went quiet.

Here's a list of quotes that went quiet in the last [3-6] months, with first name, job type and date:

[paste list, no phone numbers or emails needed]

Group them by job type. For each group, write one short check-in message I can personalize. Give each one a reason to reply now that's true for us (for example, the season or our schedule), not a made-up deadline.

Good answer: a few groups, a short message for each, and no invented discounts or deadlines.

Keep customers and get referrals

8. Ask for a review and a referral after a job

Use within a day or two of finishing a job.

We just finished [job] for [first name]. Something specific about the job: [detail].

Write a short thank-you text that mentions the detail and asks for a review at [review link]. Then write a separate message for a week later asking if they know anyone who could use us.

Good answer: personal, mentions the real detail, one ask per message.

9. Reply to a review, good or bad

Use when a new review comes in.

Here's a review we got: [paste review].

Write a public reply. If it's positive, thank them in a way that mentions something specific. If it's negative, stay calm, take responsibility for what's ours, don't argue facts in public, and offer to talk offline. Under 80 words.

Good answer: specific, calm, short, and never shares customer details in public.

10. Reach out to past customers about their next service

Use for repeat or seasonal work.

Here are past customers by job type and date, first names only:
[paste list].

Based on the Business Brain, what's a sensible next service for each group and when? Write one short, helpful message per group. Helpful first, sales second.

Good answer: realistic timing, messages that would make sense to the customer, no pushy language.

Run the week

11. Prep for a sales call

Use 10 minutes before a call.

I have a call with [first name] from [type of business or situation] about [topic]. Here's what I know: [notes, past emails].

Give me: a one-paragraph summary, what they probably care about most, three questions to ask, likely objections with short answers, and the next step I should aim for.

Good answer: short enough to read in two minutes, and the next step is specific.

12. Recap a call or meeting with next steps

Use right after a call. Paste your notes or a transcript.

Here are my notes from a call with [first name]: [paste notes or transcript].

Write a follow-up email that recaps what we agreed, lists next steps with who does what and by when, and confirms the next meeting. Then give me a short internal note with anything I promised.

Good answer: only lists things that were actually said, with clear owners and dates. Check every promise against your notes.

13. Weekly numbers check-in

Use every Friday. Paste your own numbers from your CRM, spreadsheet or calendar.

Here are this week's numbers: new leads [], replies within one business day [], quotes sent [], quotes followed up [], jobs won [], revenue booked []. Last week: [same numbers].

Tell me in plain language what changed, the one thing most likely costing us money, and one action for next week. Use only the numbers I gave you. If something is missing, say so.

Good answer: uses only your numbers, does the math correctly (double-check it), and gives one action, not ten.

Bonus: write down how you do something

When you notice yourself explaining the same thing over and over, record a quick voice memo on your phone, get the transcript, and paste it in:

Here's a voice memo of me explaining how we [do a task]:
[paste transcript].

Turn it into a step-by-step checklist someone new could follow. Keep my wording where it matters. Mark anything unclear with [ASK OWNER].

Save the result in your project. Over time, these checklists are how the assistant, and your team, start doing things your way.

Privacy dos and don'ts

Most of the risk here comes from setup choices you control: which account you use, what your team is allowed to do, and how much you paste in. This page covers those choices. It's general guidance, not legal advice. If you're in a regulated field such as healthcare, finance, legal or insurance, check your industry's rules before you use customer data with any AI tool.

Do

- **Use a business account on your business email**, and a team plan once staff use it.
- **Turn off training on your chats**, or confirm your business plan doesn't train on your data.
- **Use first names, initials or "Customer A"** instead of full names and contact details. The assistant rarely needs them to write a good draft.
- **Keep the Business Brain free of secrets.** Facts about how you work, not passwords, account numbers or private customer data.
- **Read every draft before it goes out.** Check names, prices, dates and promises.
- **Check numbers, tax, legal and contract answers** with the person who's responsible for them.
- **Tell your team which tool is approved** and what can go in it. A one-page note is enough.
- **Remove access when someone leaves**, the same way you would for email.

Don't

- **Don't paste passwords, logins or security codes.**
- **Don't paste bank, card or Social Security numbers.**
- **Don't paste health information, employee HR files or anything under an NDA** unless your plan and your contracts allow it.
- **Don't upload full customer lists** with phone numbers and emails into a personal account.
- **Don't let staff use their own personal AI accounts for company work.** You lose control of the data and the history when they leave.
- **Don't let the assistant send messages or make changes on its own** until you've watched it get the drafts right for a while.
- **Don't connect your email, files or CRM with full access on day one.** Start by pasting in only what a task needs. Connect tools later, one at a time, with the least access that works.

Personal account or team account?

	PERSONAL ACCOUNT	BUSINESS OR TEAM PLAN
Good for	Trying it out, just you	Anyone else on the team using it
Who controls access	Whoever signed up	The business
Training on your chats	Check the setting and turn it off	Check the plan terms; business plans generally don't train on your data by default
When someone leaves	Their history leaves with them	You remove their seat

Your first 7 days

One job a day, 15 to 30 minutes each. The goal for the week is one money-related task the assistant handles your way every time.

DAY	DO THIS	YOU'RE DONE WHEN
1	Set up your account (Part 1). Run the interview prompt and write your Business Brain (Part 2).	The project exists and the Business Brain is uploaded.
2	Paste in the instructions (Part 3). Run Prompt 1 on three real inquiries from the past month.	You'd be willing to send at least one draft with light edits.
3	List your open quotes. Run Prompt 5 on each and send the first follow-up yourself.	Every open quote has a follow-up scheduled or sent.
4	Run Prompt 7 on quotes and leads that went quiet. Send the messages you'd stand behind.	Old quotes have been contacted.
5	Run Prompt 8 for recent jobs and Prompt 9 for any unanswered reviews.	Review requests and replies are out.
6	Look back at the week's drafts. What did you fix every time? Add those fixes to the Business Brain or instructions.	The same mistake won't show up next week.
7	Run Prompt 13 with your own numbers. Pick the one prompt you'll use every day next week.	You've picked your one daily job.

Track your own week

Don't go by anyone else's numbers. Fill in yours.

	BEFORE THIS WEEK	AFTER THIS WEEK
New leads replied to within one business day		
Open quotes followed up		
Old quotes or leads contacted		
Review requests sent		
Jobs won or appointments booked		

When it goes wrong

WHAT HAPPENS	WHAT TO DO
Answers are generic	You're probably chatting outside the project, or the Business Brain is thin. Start a new chat inside the project and add more detail to the section it got wrong.
It makes up a price, date or policy	Add the real fact to the Business Brain. Remind it: "If it isn't in the Business Brain, write [CHECK]."
Drafts are too long	Give a limit: "Under 100 words." Add it to the instructions so it sticks.
It doesn't sound like you	Paste two or three real messages you've sent and say: "Write like this." Add a few lines from them to "How we talk."
It forgets things in a long chat	Start a new chat inside the project for each task. Long chats drift.
You hit a usage limit	Wait for the limit to reset, or look at a paid plan if you're using it every day.

Keep building

The goal of this kit is an assistant that knows your business and handles one real revenue task your way. Some owners keep building from here on their own. That's a good outcome.

If you want help with the next piece, there are two ways to keep going.

The Build Lab is the GrowthBoost community for owners building their own AI systems. It includes a weekly live Build Call with replays, Q&A, and a library of templates and builds. The list price is \$79 a month. Founding members pay \$49 a month, locked for as long as they stay, and founding spots are limited to the first 50 members.

The 30-Day Build is for owners who want structure. Over 30 days we take what you started with this kit and build one working system in your business, step by step, with weekly office hours. It's \$497 and includes 30 days in The Build Lab. After day 30 it continues as a Build Lab membership unless you cancel before then. The first 50 members pay \$49 a month for as long as they stay. After that it's \$79 a month.

Not sure which fits? Take the free assessment at assessment.growthboost.ai, then [book a 30-minute Fit Call with Nick](#). If neither one is a fit, he'll tell you.

Founding Build Lab: whop.com/checkout/plan_L0QI5AuO4hAIU

The 30-Day Build: whop.com/checkout/plan_JXIUxXctJ5UV1

Book a call: [FILL: booking link]

More from Nick: growthboost.ai

Product features, menu names and plans change. Steps in this kit were written in October 2026. If something looks different, the idea is the same: find the instructions, the project and the privacy setting.