

Managing your AI intern

Brief it in five layers. Miss one and the work degrades.

- 1 **Role.** Who to be and the decision it helps with.
- 2 **Context.** The business, customer, situation, constraints.
- 3 **Resources.** The raw material: the email, invoice, report, notes.
- 4 **Task.** Exactly what you want, the format, and what good looks like.
- 5 **Feedback.** One try is not a test. Tell it what to fix.

Your edge: set it up once

One interview teaches it who you are and how you work.

The setup interview · run it once

Paste one prompt into a fresh chat. It asks about your role, the business, your customers, your tone, and how to handle numbers, then writes your standing instructions.

Save it, then test it

Paste the result into your tool's settings. Test it: "Based on what you know about us, what are five things you could take off our plate this week?"

Output = Instructions × Context × Resources × Feedback

AI + QuickBooks

Four plays you can run today. Paste your data, then ask.

Past-due emails

"From this AR aging, draft a short, friendly past-due email per customer. Firmer the later they are. Show the amount and invoice."

Read the numbers

"Pull profit by customer for last month. Where are we making money, where leaking it, and one question I should ask?"

Receipts into order

"Group these card charges by expense category for an HVAC and plumbing company, flag anything odd, format to enter."

Custom fields

"Draft consistent entries for our custom fields on these jobs so every record reads the same."

The guardrails

These never bend. They keep customer trust intact.

- 1 Protect customer info.** Names, addresses, and account details do not go into a public AI tool.
- 2 Never paste payment data.** Card and bank numbers never go into a chat. Not once.
- 3 It drafts, you send.** AI does not press send and does not make the final call.
- 4 Check the numbers.** Verify any figure against QuickBooks before it reaches a customer.