

PARTICIPANT WORKBOOK

Train the Intern

A full day of learning to manage AI like your sharpest new hire. Built for the way Sailfish actually runs, from the front office to QuickBooks.

Sailfish Mechanical & Swordfish Plumbing

Stuart, Florida

October 21, 2026

9:00 AM to 4:00 PM

For

Kimberlee & Micheline

Led by

AJ Fasano, Operate Bigger

Welcome, and how to use this book

Today is not a lecture about technology. It is a working day about management. You already know how to run a team. By this afternoon you will run an AI the same way, and hand it the work that eats your week.

The morning

We slow down and build the foundation: what AI really is, how to talk to it, and how to set it up so it knows your business. You will set up your own AI in one interview, live.

The afternoon

Hands on in your real systems. We connect the tools, work QuickBooks Online, and knock out the office tasks on your list, so you leave with things already working.

One promise for the day

You will not leave with homework and good intentions. You will leave with your intern set up, connected, and already doing real work you chose.

The day at a glance

9:00	Where you are with AI. Honest self-rating, no wrong answers.
9:15	The intern reframe. Why AI fails, and why it is not the technology.
9:45	The five layers. How to brief an AI so it gets it right.
10:30	Prompt lab. Your first real prompt on a real task.
11:00	Set up your intern. One interview that teaches it who you are and how you work.
11:30	Test it and save it. Prove the setup took, then lock it in.
12:00	Lunch.
12:30	The System Leverage Method. Find the AI wins in any tool, worked on QuickBooks.
1:15	Office labs. Email, proposal follow-ups, past-due AR, service scheduling.
2:15	QuickBooks labs. Receipts, custom fields, and reading your numbers.
3:00	The Proof. Ship one real task and count the minutes saved.
3:30	Guardrails and your 30-day plan.
3:50	Questions and wrap.

EXERCISE

Where are you right now?

Rate yourself honestly. Not "have I used it," but "can I sit down with an AI tool and get it to do good work for me." We will rate again at the end of the day.

1

2

3

4

5

6

7

8

9

10

1 = never really touched it · 5 = I use it, but hit or miss · 10 = it is a reliable part of my day

The one thing that eats the most time in your week

If you had one perfect assistant tomorrow, the first job you would hand them

One "cool to do" you never get to, but wish you did

Keep these three answers close. Everything we build today points back at them.

Meet Andy. Meet Jessica.

Two interns, same summer, same company. Andy showed up, got handed a vague task, and disappeared for weeks. What came back was off-brand, off-target, sometimes just wrong. But hey, he was an intern.

Jessica was set up differently. She was told everything about the business, given clear expectations, the tools and files she needed, the exact output wanted, and the standard it was measured against. Her work came back sharp.

Same person could have been either one. The difference was not talent. It was management.

The reframe that changes everything

Most people think AI fails because the technology is not good enough. The real problem is that we do not know how to manage it. AI has capability, not judgment. Speed, not context. Knowledge, not your priorities. It does not fail because it is weak. It fails because it is under-managed.

So the question for today is simple:

Who do you want as your intern?

Everything after this page is how you get Jessica.

The five layers of managing AI

A good brief has five layers. Miss one and the work degrades. This is the whole skill.

- 1 **Role.** Tell it who to be and the decision it is helping with. "You are the office manager at a plumbing and HVAC company."
- 2 **Context.** The business, the customer, the situation, the constraints. What it would need to know if it walked in today.
- 3 **Resources.** The raw material. The email thread, the invoice, the aging report, the notes. Do not make it guess what it can read.
- 4 **Task.** Exactly what you want, the format, who it is for, and what good looks like. "A short, friendly past-due email. Three sentences. Firm but warm."
- 5 **Feedback.** One try is not a test. Tell it what to fix and let it revise. This is where average becomes excellent.

The hidden sixth layer

The setup interview. Instead of re-explaining yourself every time, you teach the AI once, in a single interview, who you are and how you work, and save it. That turns it from a stranger into an extension of you. Most people never build this. You will, before lunch.

The performance equation

Output Quality = Instructions × Context × Resources × Feedback. It is multiplication, not addition. If any one is zero, the whole thing is zero. Most people run low instruction, no context, no resources, no feedback, and expect brilliance.

The five stages of using AI

Everyone starts at the bottom. The goal today is to move you a stage or two, on purpose.

- 1 **Toy.** Random questions, low trust, "let me see what it says."
- 2 **Task.** Emails, notes, quick summaries. Real, but one-off.
- 3 **Workflow.** It is part of how you do a recurring job. This is where the time savings show up.
- 4 **System.** Connected to your tools, working from real data like QuickBooks and your inbox.
- 5 **Digital workforce.** It runs multi-step work and gives you back real hours.

Circle where you are today, and where you want to be in 90 days

1	2	3	4	5
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By the end of the afternoon, with QuickBooks connected, you will have touched stage 4 with your own hands. That is further than most businesses ever get.

Your first real prompt

Pick one real task from your desk right now. We are going to brief the intern properly, using all five layers.

LAYER 1 · ROLE

LAYER 2 · CONTEXT

LAYER 3 · RESOURCES YOU WILL GIVE IT

LAYER 4 · THE TASK, FORMAT, AND WHAT GOOD LOOKS LIKE

LAYER 5 · THE ONE THING YOU WILL TELL IT TO FIX ON THE SECOND TRY

Starter you can adapt out loud:

"You are the office manager at a residential and commercial plumbing and HVAC company in Stuart, Florida. I am going to give you a customer email thread. Draft a reply that is friendly, clear, and gets us to the next step. Ask me any questions before you write. Keep it under six sentences."

Set up your intern: one interview

You do not build two prompts anymore. You paste one interview prompt into a fresh chat, answer its questions, and it writes your standing instructions for you. That one paragraph teaches the AI who you are and how you work, so you never explain yourself again.

How it goes

Paste the Setup Interview from your Setup Kit. It asks you one question at a time, ten in all. When it is done, it writes your standing instructions in about 1,500 characters. You copy that and save it.

JOT YOUR HEADLINE ANSWERS HERE AS YOU GO

WHO YOU ARE AND WHAT YOU ACTUALLY DO IN A WEEK

THE COMPANY, WHO IT SERVES, THE JOBS YOU HANDLE

THE WORK YOU MOST WANT OFF YOUR PLATE

YOUR TONE, AND THE WORDS OR HABITS YOU CANNOT STAND

THREE THINGS IT MUST NEVER DO

Test it, then save it

Two quick moves once the interview writes your standing instructions.

1. SAVE IT WHERE EVERY CHAT CAN SEE IT

In Claude, paste it into a Project's custom instructions. In ChatGPT, Settings, then Personalization, then Custom Instructions. Do it for both you and Micheline.

2. TEST THAT IT TOOK

Paste into a fresh chat:

"Based on what you know about us, what are five things you could take off our plate this week?" If the answers sound like they are about Sailfish specifically, it worked. If they are generic, add more detail and run the interview again.

For QuickBooks and documents

When you work from a report, add: "Answer only from what I give you. Show the figures you used and where they came from. Never invent a number, and never put customer account or card details in your output."

Finding the wins in any system

You do not need a programmer to leverage the software you already run. You need a simple way to spot where AI fits. We will use this on QuickBooks, then you can point it at any tool.

- 1 **List the tedious.** What repetitive, low-judgment work happens in this system every week?
- 2 **Sort assist vs automate.** Can AI help you do it faster (draft, summarize, check), or does it need a connection to do it for you?
- 3 **Get the data out or the AI in.** Either export a report and hand it over, or connect the tool so the AI can read it directly.
- 4 **Brief it with the five layers.** Same skill from this morning.
- 5 **Check, then keep it.** Verify the output, save the prompt, and it becomes a repeatable workflow.

Your tedious list for QuickBooks (we will fill this together)

AI and QuickBooks, plainly

A "connector" is a bridge that lets your AI read from, and sometimes write to, another tool. Because you are on QuickBooks Online, two are available.

Read and understand

The Intuit QuickBooks connector lets the AI pull reports like profit and loss and cash flow, and talk you through what the numbers say.

Create and update

The Meridian connector can create records like invoices, customers, and expenses from a plain instruction.

How we will do it safely today

We connect to a sample or test company first, not your live books, so you can watch it work with zero risk. You decide later what to connect to the real thing.

WHAT MATTERS MOST IS NOT THE CONNECTOR. IT IS THAT YOU KNOW HOW TO TALK TO IT.

A connection to your books does nothing if you cannot brief it. Everything from this morning is what makes the afternoon work.

The first question you want to ask your connected books

The inbox, handled

Three of the most common time-eaters in your office, done live with your own examples.

DRAFT A REPLY TO A REAL CUSTOMER EMAIL

Paste the thread, give it the role and tone, ask it to draft a reply and to ask you anything first.

FOLLOW UP ON AN OPEN PROPOSAL OR ESTIMATE

Give it the customer, the job, and how long it has been. Ask for a short, no-pressure nudge that moves it forward.

SCHEDULE OR CONFIRM A MAINTENANCE SERVICE CALL

Turn a scheduling note into a clean, friendly email that gives the window and what to expect.

Reusable pattern: "Here is [the thread / the job details]. You are our office manager. Draft a [reply / follow-up / scheduling] email. Warm, clear, under six sentences. Ask me anything you need before you write."

Past-due, without the dread

Collecting is uncomfortable, so it slips. Let the intern draft it so all you do is review and send.

GIVE IT THE AGING

Export or pull your AR aging. Hand it the customer, the amount, the invoice, and how many days late.

SET THE TONE BY HOW LATE THEY ARE

A gentle nudge at 15 days reads differently than a firm note at 60. Tell it which.

ASK FOR A SHORT SERIES, NOT ONE EMAIL

A friendly reminder, a firmer follow-up, and a final notice, so you are never starting from scratch.

Guardrail: the AI drafts the message. You confirm the dollar figures against QuickBooks and you press send. Numbers get checked by a human, every time.

Receipts, fields, and your numbers

The QuickBooks tasks from your list, worked with the connector or with exports, whichever fits your books.

CREDIT CARD RECEIPTS INTO SOMETHING MEANINGFUL

Give it a pile of receipts and your categories. Have it organize them so expenses line up before they hit QuickBooks.

POPULATING CUSTOM FIELDS CONSISTENTLY

Draft the content that belongs in your custom fields so entries are clean and consistent across jobs.

READING PROFIT BY JOB, CUSTOMER, AND DEPARTMENT

Pull the report and ask plain questions: where are we making money, where are we leaking it, what stands out.

Try live: "Here is our profit by customer for last month. In plain language, what are the three things I should pay attention to, and one question I should be asking?"

Ship one real thing

Before we talk about someday, you are going to finish one real task today, start to done, and time it.

The task I am shipping right now

What it normally takes me

minutes

What it took with the intern

minutes

Minutes saved, and what I would do with that time back

If it saved you twenty minutes on one task, that is your week transformed once you have ten of these.

The guardrails

A few rules that never bend. They keep you safe and keep customer trust intact.

Protect customer information

Names, addresses, and account details do not go into a public AI tool. Strip them, or use only a connected, private setup.

Never paste payment data

Card numbers and bank details never go into a chat, ever. Not once.

It drafts, you send

AI does not press send and does not make the final call. A person signs off on anything that leaves the office.

Check the numbers

Any figure it produces gets verified against QuickBooks before it goes to a customer.

The one-line version

It does not decide, it does not press send, and nothing sensitive goes in. Everything else, go build.

What is possible next

Some of what you asked about is bigger than a chat window. It is real, it is doable, and it is the natural next step once today's foundation is set. Here is the honest map.

Ready today, as an assistant

Drafting email, follow-ups, and past-due notices. Organizing receipts. Reading and explaining your QuickBooks reports. Writing content for custom fields. These you will be doing this afternoon.

Phase two, with connections built

Pulling data out of QuickBooks into a database. Running reports across your tools into one weekly meeting package. Reviewing GPS and tracking data for tardiness patterns. These need systems wired together, not just a good prompt, and they are exactly what a follow-on build handles.

The rule of thumb: if it is drafting, summarizing, or explaining, you can do it now. If it needs to reach into a system and move data on its own, that is a build. Today gets you fluent enough to know the difference and to lead that build.

Your 30-day plan

The training is one day. The habit is what pays. Four small weeks.

☐ **Week 1.** Use your saved setup on one real task a day. Just get reps. Write the task on the line.

☐ **Week 2.** Pick one office workflow from today (AR, follow-ups, scheduling) and run it entirely through the intern for the week.

☐ **Week 3.** Bring Micheline and Kimberlee's setups together. Compare prompts, keep the best, and teach one other person one thing.

☐ **Week 4.** Write down the one bigger thing you want built next, from the "phase two" page. That is your follow-on conversation.

Rate yourself again

Where are you now, 1 to 10? Compare it to page 3. That jump in one day is the whole point.

Notes and next steps

When you are ready for phase two

The systems, the connections, and the automations that give you real hours back. That is what Operate Bigger builds with you next.

OPERATEBIGGER.

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Everything from today lives here

Bookmark this page. Your workbook, cheat cards, and the Intern Setup Kit are all here to download any time.



operatebigger.com/sailfish

Scan the code or type the address.

- This participant workbook
- Your two cheat cards
- The Intern Setup Kit (the one-interview setup)

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