MOMENTUM
AI INSTITUTE

HABITS / EVERY TOOL AND SETUP

5 AI habits I would build if I was starting my business from *zero*

Every tool and setup from the carousel, with the steps to start this week.

THE 5 HABITS

- [ ] **1. Start with a morning brief** (page 2)
- [ ] **2. Triage your inbox with AI** (page 3)
- [ ] **3. Turn one video into a week of posts** (page 4)
- [ ] **4. Review your numbers every week** (page 5)
- [ ] **5. Automate one task every week** (page 6)
- [ ] **Top questions, answered** (page 7 and 8)

START None of this needs a big team. It needs a routine. Pick one habit to start this week.



Start with a *morning brief*

WHY THIS HABIT

Before you open a single app, let AI read the day for you. One scheduled task that checks your calendar, pulls the emails that need you, and lists your three most important moves.

TOP TOOLS

- **ChatGPT Tasks** Schedules a prompt to run on its own, daily or one time. help.openai.com tasks
- **Google Calendar** Your day, for the brief to read.
- **Gmail** The emails that need you.
- **Perplexity** Optional: add a short news check for your industry.
- **Also works** Claude or Gemini with your calendar and email connected, if your plan supports it.

SET IT UP

- [ ] Connect Gmail and Google Calendar in ChatGPT's settings.
- [ ] Create a task that runs every morning before you start work.
- [ ] Paste the prompt below. Read the brief before you open your inbox.

PROMPT: Every weekday morning, check my calendar and my inbox. List my meetings, the emails that need a reply from me today, and my three most important moves. Keep it under 150 words.

Ask me any questions you need answered before you start.



Triage your *inbox with AI*

WHY THIS HABIT

Let AI sort it into reply now, read later, and ignore. Use it to draft the first version of every reply, then you edit and send. You stay the voice of the business.

TOP TOOLS

Gemini in Gmail Summarizes threads and drafts replies inside Gmail. support.google.com

Superhuman Email app with AI drafting and split inboxes. superhuman.com

Fyxer AI Sorts your inbox and drafts replies in your tone. fyxer.com

SaneBox Moves low priority mail out of your main inbox. sanebox.com

SET IT UP

- [ ] Make three labels: Reply now, Read later, Ignore.
- [ ] Each morning, ask AI to sort new mail into the three labels.
- [ ] Let AI draft the first version. You edit and send every reply.

PROMPT: Sort these emails into reply now, read later, and ignore. For each reply now email, draft a short answer in my voice. Do not send anything.

Ask me any questions you need answered before you start.



Turn one video into *a week of posts*

WHY THIS HABIT

Film one honest video a week about what you do. Clip the best moments for Reels, pull the transcript, and turn it into a caption, an email, and a post for Google Business.

TOP TOOLS

- **OpusClip** Finds short clips in a long video. opus.pro
- **Descript** Edit video by editing the transcript. descript.com
- **Claude** Turns the transcript into captions, an email and posts. anthropic.com/claude
- **CapCut** Quick edits and captions on your phone. capcut.com
- **Canva** Cover images and quote graphics. canva.com
- **Google Business** Where local customers already look. google.com/business

SET IT UP

- [ ] Film one video a week, 3 to 10 minutes, about a real customer question.
- [ ] Upload it to OpusClip or Descript for clips and a transcript.
- [ ] Give the transcript to Claude with the prompt below.

> PROMPT: From this transcript, write one Instagram caption, one short email to my list, and one Google Business post. Keep my words and my tone.
>
> **Ask me any questions you need answered before you start.**



Review your *numbers every week*

WHY THIS HABIT

Every Friday, export the week into one sheet. Leads, booked calls, sales, ad spend. Ask AI what changed and why. You will spot the slow week before it becomes a slow month.

TOP TOOLS

Google Sheets One tab, one row per week. workspace.google.com

ChatGPT Reads the sheet and tells you what changed. chatgpt.com

SET IT UP

- [ ] **Weekly sales sheet:** columns for week, leads, booked calls, sales, ad spend.
- [ ] **Lead source column:** where each lead came from.
- [ ] **Friday review reminder:** a recurring calendar event, 10 minutes.
- [ ] **One question for AI:** the prompt below.

PROMPT: Here is my weekly sheet. What changed this week compared with the last four weeks, and what is the most likely reason? Give me one thing to do next week.

Ask me any questions you need answered before you start.



Automate one *task every week*

WHY THIS HABIT

Pick the one task you did three times this week and hated. New lead comes in, it lands in your sheet, gets a reply, and books on your calendar without you.

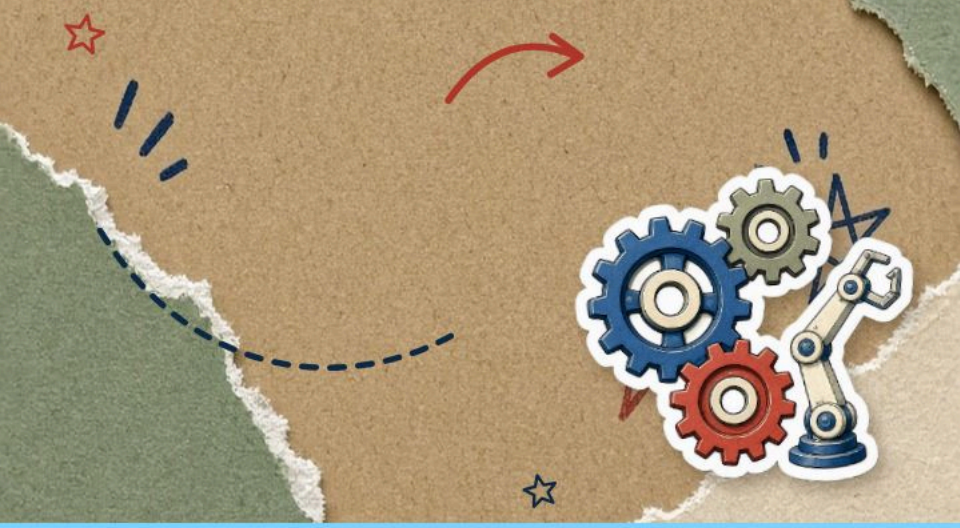
TOP TOOLS

- **Make** Visual automation builder. make.com
- **Zapier** Connects your apps with simple steps. zapier.com
- **n8n** Automation you can also host yourself. n8n.io
- **Calendly** Booking links. calendly.com
- **Forms** Typeform or Google Forms to capture leads. typeform.com

SET IT UP

- [ ] **Lead capture:** form to Google Sheets.
- [ ] **Follow up emails:** new row sends a Gmail reply.
- [ ] **Booking links:** the reply includes your Calendly link.
- [ ] **Invoice reminders:** a weekly check for unpaid invoices.

Next ideas: review requests after a job, welcome emails for new customers, a weekly backup of your sheet.



Top questions, *answered*

GETTING STARTED

Which habit should I start with?
The one that hurts most this week. If you live in email, start with habit 2. If you feel behind every morning, start with habit 1.

How much time does this take?
Setup is the slow part. Once a habit is running, it becomes part of your week.

Do I need a big team or a developer?
No. You can start every habit here without writing code. It needs a routine, not a team.

TOOLS AND COST

Do I need paid plans?
Start on the lowest plan of the tools you already use. Feature limits and pricing change, so check each pricing page before you commit.

ChatGPT, Claude or Gemini?
Use the one you already pay for or open daily. The habit matters more than the brand.

Make, Zapier or n8n?
Pick Zapier for simple step lists, Make for a visual map of each step, and n8n if you want to host it yourself.



Before you *switch it on*

SAFETY AND CONTROL

Is it safe to connect my email and calendar?
Connect only the accounts you need, review the permissions each app asks for, and remove access you no longer use.

Will AI send emails for me?
Only if you set it up that way. In this kit AI drafts, and you edit and send every reply.

What if the AI gets a number wrong?
Treat its answer as a first read. Check any number against your sheet before you act on it.

KEEP IT GOING

- [ ] Pick one habit to start this week.
- [ ] Add one new automation every week.
- [ ] Review on Fridays and adjust.

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HABITS Want help setting these up with other owners doing the same?

Join the Momentum AI community on Skool, $29/mo:
https://www.skool.com/momentum-ai/about

