

by Erick / The AI Guy...

AI AGENT STARTER

checklist

10 tasks you can hand to an AI agent this week, each with a copy and paste prompt starter

start here...

HOW TO USE THIS *checklist*

Hey, Erick here. I spent 12 years in the Marine Corps and 8 years as a police officer, so I am a big believer in two things: a clear checklist and a second set of eyes before anything goes out. That is how this works.

3 *steps*

1

Pick one task.

Not all ten. Pick the one that would save you the most annoying hour this week.

2

Copy the prompt starter and fill in the [BRACKETS].

Every starter uses my BRIEF framework: Background, Role, Instructions, Examples, Final output. The last line asks the AI to quiz you first, so you get a better result.

3

Review the output before you use it.

Every task has a "What you review" line. That is the step that catches the mistakes.

REMINDER: WHAT AN AGENT IS (*3 parts*)



Brain

the AI model. It reads, thinks, and decides.



Tools

the things it can use, like email, a calendar, a browser, or your apps.



Goal

the job you gave it.

*Brain, tools, goal. A chatbot answers. **An agent acts.***

before you hand anything over...

THE SIMPLEST THING THAT *works*

Start with the simplest setup that does the job. If a plain prompt in a normal AI chat gets you there (paste your notes in, get a draft back), stop there. Reach for an agent, meaning an AI agent tool that can search the web or use your apps, only when the job needs multiple steps or outside tools. Anthropic says the same in "[Building effective agents](#)": find the simplest solution possible, and only add complexity when you need it. Agents are newer and messier than chatbots, so they work best on jobs where a mistake is easy to catch.

WHAT COUNTS AS AN "AGENT TOOL" HERE

Use whatever you already have: an AI assistant with tools or browsing turned on, an AI agent tool, or an automation tool. The starters below are tool agnostic. If a task says "paste it in," you can do it in any normal AI chat.



SAFETY *box*

- **Review before sending.** Every email, post, or reply is a draft until you have read it and sent it yourself.
- **Start read-only or draft-only.** Let the agent look and write. Do not let it send, delete, post, or buy on its own while you are learning.
- **Never give an agent access to money or sensitive accounts you do not need to.** That means banking, payment tools, password managers, and anything with client private data.
- **Paste, do not connect, when you can.** Pasting the text you want worked on is safer than giving an agent your whole inbox.
- **Skip the call recording tasks.** I live in South Florida, and Florida is an all party consent state, so recording a call generally needs everyone on the call to agree. Nothing in this checklist asks an agent to record calls. If you ever record, get consent first and check the rules for your state and your clients' states.

the 10 tasks, group a: research...

1 LEAD RESEARCH *list*

MEDIUM

HAND IT OVER WHEN

You need a list of possible customers and do not want to spend your evening opening 40 browser tabs.

ACCESS NEEDED

Web browsing, read-only.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I run [YOUR BUSINESS] and help [IDEAL CUSTOMER TYPE] with [WHAT YOU DO]. I want new leads in [CITY, NICHE, OR INDUSTRY].

Role: You are a careful research assistant. You only report what you can find on public pages.

Instructions: Find [10] businesses that look like a good fit. For each one, note what they do, one specific reason they fit, and the business contact method they publish themselves. Do not guess email addresses. If you cannot confirm something, write "not found". Include the link where you found each fact.

Examples: Example Plumbing Co. | Family plumbing company in Miami | Fit: advertises 24 hour service but has no online booking | Contact: web form on their contact page | Source: [link]

Final output: A table with these columns: Company, What they do, Why they fit, Public contact method, Source link.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Open at least three of the source links. Confirm each business is real, still operating, and truly a fit. Delete any row you cannot verify. Before you contact anyone, check the rules for cold outreach where you and the lead are located.

the 10 tasks, group a: research...

2 PODCAST GUEST RESEARCH AND PITCH *drafts*

MEDIUM

HAND IT OVER WHEN

You want to be a guest (or book guests) and the research is the part keeping you from starting.

ACCESS NEEDED

Web browsing, read-only. Draft text only. Do not connect it to your email.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I am [YOUR NAME], I talk about [YOUR TOPIC] for [YOUR AUDIENCE], and my best story or proof is [ONE TRUE LINE ABOUT YOU]. I want to pitch podcasts in [NICHE].

Role: You are my booking researcher and pitch writer.

Instructions: Find [10] podcasts in [NICHE] that interview guests. For each one, check the show's own page for the host name, what the show covers, and how they accept guest pitches. Pick the best fit and say why. Then write a short pitch email draft for each, with one specific detail from a recent episode. Do not invent episode details. If you cannot find a recent episode, say so and leave that line blank. Do not send anything.

Examples: Show: [Example Show] | Host: [name] | Why it fits: covers [topic] for [audience] | How they take pitches: [form or email on their site] | Source: [link]

Final output: A table of the 10 shows, followed by 10 pitch drafts, each under 120 words, with a subject line.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Confirm the host name and the episode detail on the show's own page. Check that every claim about you is true. Edit the pitch into your voice, then send it yourself.

the 10 tasks, group a: research...

3 COMPETITOR PRICE AND OFFER

scan

MEDIUM

HAND IT OVER WHEN

You have not looked at what others in your space are charging or offering in a while.

ACCESS NEEDED

Web browsing, read-only. Public pages only. No logins.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I sell [YOUR OFFER] to [CUSTOMER TYPE] in [MARKET]. These are the competitors I already know about: [LIST 3 TO 5 NAMES OR LINKS].

Role: You are a market research assistant who reports only what is visible on public pages.

Instructions: For each competitor, find what they offer, how they describe it, and any prices or packages shown publicly. Record the page link and the date you looked. If a price is not shown, write "not listed" and do not estimate. Then list 3 gaps or patterns you notice, and mark each one as "seen on the page" or "my guess".

Examples: Competitor: [Name] | Offer: [what they sell] | Public price: [amount or not listed] | Notable promise: [quote from page] | Source: [link] | Checked: [date]

Final output: One comparison table, then a short list of 3 gaps or patterns.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Open each competitor page and check the price and the quote against what the agent wrote. Treat every "my guess" line as an idea, not a fact.

the 10 tasks, group a: research...

4 TOPIC RESEARCH BRIEF WITH sources

EASY

HAND IT OVER WHEN

You need to get up to speed on a topic fast, for a client call, a post, or a decision.

ACCESS NEEDED

Web browsing, read-only.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I need to understand [TOPIC] well enough to [WHAT YOU WILL DO WITH IT, for example explain it to a client or write a post]. My audience is [WHO WILL READ OR HEAR IT].

Role: You are a research analyst who values primary sources and says plainly when something is unclear.

Instructions: Research the topic and write a brief. Use [5 TO 8] sources, favoring official pages, original reports, and well known publications. Put a link next to every factual claim. Do not include numbers or quotes you cannot link to. List anything that sources disagree on, and anything you could not confirm.

Examples: Claim: [one sentence] | Source: [link] | How sure: [confirmed on the page, or reported by a secondary source]

Final output: A one page brief with these sections: Summary in 5 bullets, Key facts with links, What sources disagree on, What I could not confirm, and 3 questions worth asking an expert.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Click the links behind the 3 most important claims. Make sure each one says what the brief says it says. Do not repeat any number you have not seen on the source yourself.

the 10 tasks, group b: inbox and admin...

5 INBOX TRIAGE AND REPLY *drafts*

MEDIUM

A normal AI chat is enough if you paste it in

HAND IT OVER WHEN

Your inbox is a pile and you want a sorted list plus draft replies to react to.

ACCESS NEEDED

Easiest and safest: paste in [10 TO 20] emails with private details removed. If your tool can read your inbox, set it to read-only and draft-only. No sending, no deleting.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I am [YOUR NAME], [YOUR ROLE] at [YOUR BUSINESS]. Below are emails from my inbox. My priorities this week are [TOP 2 OR 3 PRIORITIES]. Important senders: [NAMES OR TYPES, for example current clients].

Role: You are my inbox assistant. You sort and draft. You never send, delete, or archive anything.

Instructions: Sort every email into one of four groups: Urgent today, Needs a reply this week, Can wait, and Ignore. For the first two groups, write a short draft reply in my voice. If you are missing a fact, put [ASK ME] in the draft instead of guessing. Flag anything about money, contracts, or a complaint for my personal attention.

Examples: Email from [Sender] about [subject] | Group: Urgent today | Why: [one line] | Draft reply: "Hi [Name], thanks for [thing]. I can [answer] by [day]. [Your name]"

Final output: A table with Sender, Subject, Group, and Why, followed by the draft replies in order of urgency.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Skim the Ignore group first, because that is where a missed email hides. Read each draft out loud, fix anything that is not true or not you, and send it yourself.

the 10 tasks, group b: inbox and admin...

6 MEETING PREP *brief*

EASY

HAND IT OVER WHEN

You have a call coming up and five minutes to get ready, not thirty.

ACCESS NEEDED

Paste in the invite details and your own notes. Optionally, read-only access to your calendar. Prep only. No recordings.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I have a [TYPE OF MEETING] with [PERSON OR COMPANY] on [DAY AND TIME]. Here is the invite text, my past notes, and anything they have sent me: [PASTE]. My goal for the meeting is [GOAL].

Role: You are my chief of staff. You prepare me, you do not speak for me.

Instructions: Write a one page brief. Use only what I pasted and, if you can browse, the person's or company's own public pages, with links. Mark anything you inferred as "inferred". Suggest an agenda and 5 questions I should ask. List any open items from past notes.

Examples: Open item: "Send revised quote" | Source: my note from [date] | Status: not confirmed done

Final output: One page with these sections: Who and why, What I know, Open items, Suggested agenda, Questions to ask, and Risks or sensitive topics.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Check names, titles, and dates against your own notes. Anything marked "inferred" is a maybe, not a fact. Cut anything you would be embarrassed to say out loud if it were wrong.

the 10 tasks, group b: inbox and admin...

7 WEEKLY REPORT SUMMARY FROM PASTED *notes*

EASY

A normal AI chat is enough if you paste it in

HAND IT OVER WHEN

You have scattered notes from the week and need a clean update for a client, your team, or yourself.

ACCESS NEEDED

None. Paste your notes into the chat.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I am writing the weekly update for [AUDIENCE, for example my client or my team] about [PROJECT OR BUSINESS]. Below are my raw notes from this week: [PASTE NOTES AND ANY NUMBERS YOU WANT INCLUDED].

Role: You are a clear, plain spoken business writer.

Instructions: Summarize only what is in my notes. Do not add numbers, results, or claims that I did not write. If a section is missing information, write "no update provided". Keep the tone [FRIENDLY AND DIRECT]. Keep it skimmable.

Examples: Win: "Launched the new landing page on [date]." Blocker: "Waiting on [thing] from [person]." Next step: "Send [thing] by [day]."

Final output: A short update under 250 words with these headers: Wins, In progress, Blockers, Next week, and one line asking for what I need from the reader.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Compare every number and date to your notes, line by line. Make sure nothing sounds bigger or better than what really happened.

the 10 tasks, group c: content...

8 CONTENT *repurposing*

EASY

A normal AI chat is enough if you paste it in

HAND IT OVER WHEN

You made one good thing (a post, video transcript, or newsletter) and want it in other formats without starting over.

ACCESS NEEDED

None. Paste in your original content.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I am a [CREATOR OR BUSINESS TYPE] who talks to [AUDIENCE] about [TOPIC]. Here is my original piece of content: [PASTE]. My voice is [3 WORDS, for example friendly, direct, punchy].

Role: You are my content editor. You keep my meaning and my voice.

Instructions: Turn the original into [3 SHORT POSTS, 1 CAROUSEL OUTLINE, AND 1 EMAIL]. Use only ideas and facts from the original. Do not add statistics, quotes, or results that are not in it. Keep sentences short. No hype words, no promises about results.

Examples: Short post style: one hook line, three short lines, one question at the end. Hook example: "Most people use AI like a search bar. Here is the better way."

Final output: The 3 posts, the carousel outline (one line per slide, 8 slides), and the email draft with a subject line.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Check each fact against your original. Read it as your audience would. If a line does not sound like you, rewrite it before posting.

the 10 tasks, group d: customer facing and small business...

9 FAQ AND SUPPORT REPLY *drafts*

MEDIUM

A normal AI chat is enough if you paste it in

HAND IT OVER WHEN

You keep answering the same customer questions and want a bank of drafts you can adapt.

ACCESS NEEDED

Paste in your real policies and past questions. Draft only. Do not connect it to a live support inbox or chat while you are testing.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: I run [YOUR BUSINESS], which sells [PRODUCT OR SERVICE] to [CUSTOMERS]. Here are my real policies and facts: [PASTE: pricing, hours, refund or cancellation policy, delivery times]. Here are 10 questions customers often ask: [PASTE].

Role: You are my customer support writer. You use only the policies I pasted.

Instructions: Write a reply draft for each question. If the answer is not in my policies, write [ASK ME] instead of guessing. Never promise refunds, discounts, deadlines, or results. Mark any question that involves money disputes, legal issues, health, safety, or an upset customer as "needs a human". Keep replies warm, short, and plain.

Examples: Question: "Can I get a refund?" | Draft: "Thanks for asking, [Name]. Our policy is [pasted policy]. If you want to go ahead, here is how: [step]." | Flag: needs a human if the customer is disputing a charge

Final output: A table with Question, Draft reply, and Flag, plus a list of any questions my policies do not answer.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Check every policy detail against your real policy. Look hardest at the "needs a human" flags and at any promise or deadline in a draft. Send replies yourself, at least until you trust the drafts.

the 10 tasks, group e: personal...

10 WEEKLY SCHEDULE AND CALENDAR *plan*

EASY

A normal AI chat is enough if you paste it in

HAND IT OVER WHEN

The week looks packed and you want a realistic plan, not another pile of good intentions.

ACCESS NEEDED

Easiest: paste in your calendar events and your to do list. If your tool can read your calendar, set it to read-only. Do not let it create, move, or delete events.

PROMPT STARTER

COPY AND FILL IN THE [BRACKETS]

Background: My week starts [DATE]. Here are my fixed commitments: [PASTE CALENDAR EVENTS]. Here is my to do list: [PASTE TASKS WITH ROUGH TIME ESTIMATES]. My working hours are [HOURS]. My top 3 priorities are [PRIORITIES]. Things I protect: [EXAMPLES: gym, family dinner, lunch].

Role: You are my planning assistant. You suggest a plan, you do not change my calendar.

Instructions: Build a day by day plan that fits the tasks around my fixed commitments. Leave buffer time between meetings and travel. Put priority tasks in my best energy hours, which are [MORNINGS OR AFTERNOONS]. If everything does not fit, tell me what to drop or move instead of squeezing it in. List any conflicts or time zone issues you notice.

Examples: Tuesday: 9:00 to 10:30 Priority task A | 10:30 to 11:00 Buffer | 11:00 Client call (fixed) | 12:00 Lunch (protected)

Final output: A day by day plan for Monday to Friday, then a short list of tasks that did not fit and your suggestion for each.

Ask me any questions you need answered before you start.



WHAT YOU REVIEW

Compare the plan to your real calendar. Check meeting times, time zones, travel time, and anything you told it to protect. You add anything to your calendar yourself.

two minute check...

CHECK EACH AGENT *output*

Run this before you use anything an agent gives you. Takes two minutes.

- ☐ **Did it do the job I asked for?** Re-read your goal and compare it to the result.
- ☐ **Did I open the links?** At least the ones behind the most important claims. If a claim has no link, treat it as unverified.
- ☐ **Do the names, numbers, and dates match my own notes or the source page?** Check them yourself.
- ☐ **Did it make anything up?** Watch for details that sound right but have no source. "Not found" is a good answer, not a failure.
- ☐ **Does it sound like me?** Read it out loud. Rewrite anything that does not.
- ☐ **Did it do anything I did not ask for?** Check what it opened, changed, or drafted.
- ☐ **Is any private or client information in there that should not be?** Remove it.
- ☐ **Am I the one pressing send, post, or publish?** Always.

know when to skip it...

WHEN NOT TO USE AN *agent*

Skip the agent, or keep a human fully in charge, when:

- **Money is moving.** Payments, refunds, payroll, invoices, or anything connected to a bank or card.
- **The account is sensitive.** Banking, password managers, health records, and anything with private client data you do not need to share.
- **The decision is legal, medical, financial, or about hiring or firing.** Use a qualified person. An agent can help you prepare questions, not make the call.
- **The task involves recording or listening in on calls.** Florida is an all party consent state. Easiest rule: do not hand this to an agent.
- **A mistake would be hard to undo.** Mass emails, public posts, deleting files, anything you cannot take back.
- **You could not check the result.** If you would not know a wrong answer when you saw one, it is not a good first task.
- **A plain prompt would do the job.** If pasting text into a normal AI chat gets you a good draft, use that. Simplest thing that works.

next step...

START WITH ONE TASK *this week.*

Pick the task from this list that matches the most annoying hour in your week. Fill in the brackets, run the starter, and go through the review step before you use anything. One task done carefully beats ten tried at once.

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