

SECURE MINDED · MAKE AI GIVE YOU TIME BACK

Jobs you'd hand over.

Twenty recurring jobs a business owner can brief once and never explain again. Plus the one everybody asks for: the meeting that writes its own client note.

Ask less. Brief once. Build one that argues back.

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Every job here has the same three parts.

The session showed you one job handed over properly, start to finish. This is the list of what else fits the same shape. Pick the one you resent, not the clever one.

Trigger

When it runs. A day and time, or a thing that happens: an email lands, a job is marked done, a meeting ends.

Input

What it looks at. The list, the inbox, the export, the transcript. If it can't reach it, you paste it.

Output

What lands in front of you. Drafts to read and send. A list to check. One page you would actually show someone.

Two labels

FREE SKILL Works as a saved set of standing instructions on a free Claude or Gemini account. You start it, you give it the input.

SCHEDULED Runs without you. Needs a paid plan and access to wherever the data lives. Writing it is free. Having it run without you is not.

The pattern that makes any of these work

You describe the job in one plain sentence. The tool interviews you, writes its own instructions, and saves them. It runs. About the third week it gets one wrong, and you fix the standing instructions, not the draft. That last part is the actual skill.

I want to hand you a job I do every week so I don't have to re-explain it each time.

The job is: **[one of the jobs in this pack, in your own words]**.

Interview me before you attempt it. Ask ONE question, then stop and wait for my answer. Three questions only, covering what triggers the job, what I'll give you, and what the output has to look like.

Then write it as a skill I can save. Write it addressed to yourself, as standing instructions, not as a summary of our chat. Under 400 words.

The full handover prompt, with the headings it should write under and the line to add for anything customer-facing, is in the main prompt pack.

The ones that pay for the subscription in the first month.

01

Overdue invoice chaser with an escalation ladder

Trigger Every Monday. **Input** Invoices more than 7, 14 and 30 days overdue. **Output** A draft for each, in a tone that steps up with the age of the debt. Never threatening, never apologising, never invents a payment plan.

SCHEDULED

02

Quote follow-up drafts

Trigger Quotes sent more than seven days ago with no reply. **Output** One draft each, under 120 words, one question at the end. The session example.

SCHEDULED

03

What didn't get invoiced

Trigger Last working day of the month. **Input** Jobs marked done, invoices raised. **Output** Finished work with no invoice against it, and a draft for each. For trades and services this one is the whole argument.

SCHEDULED

04

Price-change watcher

Trigger Monthly. **Input** This month's supplier invoices and last month's. **Output** Every line where the unit price moved, by how much, and which quotes you have out that were priced on the old number.

SCHEDULED

05

Tender and RFQ first pass

Trigger A tender pack lands. **Input** The documents. **Output** Go or no-go on one page. Mandatory criteria you can't meet, the deadline, submission mechanics, and the clauses a lawyer would flag. Saves the day you would have spent reading it to find out it wasn't for you.

FREE SKILL

The ones that give you Monday back.

06

Monday missed-items check

Trigger Monday, 7am. **Input** Last week's mail, calendar and tasks. **Output** What you promised and haven't done, what people asked and you haven't answered, and what's on this week that needs something from you first. The one in the session screenshots.

SCHEDULED

07

Reply drafts for the five recurring enquiries

Every business gets the same five emails: price, availability, "can you do X", "where's my order", "can I get a copy of". **Trigger** An email that matches one. **Output** A draft in your voice with the facts in square brackets.

FREE SKILL

SCHEDULED ON A PAID PLAN

08

The commitments scan

Trigger Friday afternoon. **Input** Your sent mail for the week. **Output** Every sentence where you promised something with a date. Owners are surprised every time by what they said they would do.

SCHEDULED

09

Pre-meeting brief

Trigger Thirty minutes before any external meeting. **Input** The invite, the last three threads with that person, open quotes and invoices. **Output** One page. Who they are, what's open, what you said last time, the one thing to ask.

SCHEDULED

10

Voice memo to client-ready report

For anyone who does site visits. **Trigger** A voice memo after the job. **Output** A report in the format the customer expects, with anything uncertain in square brackets. The standing instructions carry the format, the sections and the tone, so the memo can ramble.

FREE SKILL

The expensive thing in your week isn't writing. It's the decision that's been sitting there three weeks.

11

The Contrarian

Bring it any decision you are leaning towards. It is paid to find the flaw, not to reassure you. Never opens by agreeing. Ships in the main pack as a file you can upload.

FREE SKILL

12

The pre-mortem

Sibling of the Contrarian for anything expensive: a hire, a vehicle, a lease, a new service line. "Assume it's twelve months from now and this went badly. Give me the three most likely reasons, using my numbers."

FREE SKILL

13

Contract and terms red-flag read

Trigger Any contract, lease, supplier terms or platform T&Cs before signing. **Output** The five clauses that cost money or lock you in, in plain English, with the question to ask about each. Not legal advice. The thing you read before deciding whether to pay for legal advice.

FREE SKILL

14

Monthly owner's one-pager

Trigger First of the month. **Input** The P&L export, cash position, overdue debtors, the pipeline. **Output** One page you would show a bank or a business partner. Same layout every month so the changes are visible.

SCHEDULED

15

Should I say yes to this job

For quoting. **Input** The enquiry and your capacity for the next month. **Output** The questions to ask before pricing it, the reasons it might be a bad job, and what it would need to be worth. Stops the reflex yes.

FREE SKILL

The ones that stop you being the bottleneck.

16

Roster and leave clash check

Trigger Thursday, before next week's roster goes out. **Input** Roster, approved leave, public holidays. **Output** The gaps, and the people rostered on while on leave.

SCHEDULED

17

New starter pack from what you already have

Input The scattered documents, emails and half-written procedures a new hire currently gets shown one at a time. **Output** A first-week guide in one consistent voice, with the gaps listed so you know what still needs writing.

FREE SKILL, ONCE PER ROLE

18

Review responses in your voice

Trigger A new Google or Facebook review. **Output** A reply that sounds like you, thanks them for the specific thing, and never argues with a bad one. The standing instructions carry what you will and won't say publicly.

FREE SKILL

19

Complaint first draft and root-cause note

Trigger A complaint. **Output** Two things. The reply, and a three-line note on what caused it so the same one doesn't come back. The second part is the one owners never get to.

FREE SKILL

20

What did the team ask me this week

For owners who are the bottleneck. **Trigger** Friday. **Input** Internal chat and email. **Output** Every question the team asked you this week, grouped. Anything asked three times is a procedure that needs writing, and it drafts it.

SCHEDULED

The meeting that writes its own client note.

You walk out of a client meeting. Ten minutes later the CRM has the note, the tasks are sitting against the client with dates on them, and you didn't type any of it.

Trigger An external meeting ends and the recorder has the transcript. **Input** The transcript, and the client record. **Output** A client note under 150 words, and every commitment as a task with an owner and a date. Shown to you before anything is saved.

SCHEDULED, WITH CONNECTORS

FREE BY HAND: PASTE THE TRANSCRIPT, PASTE THE NOTE BACK

The standing instructions

After every external meeting I'll give you the transcript. Do this:

1. Work out who the meeting was with and which client or deal it belongs to. If you're not sure, ask me one question, then stop.
2. Write a client note for the CRM, under 150 words. What they said they want, what we agreed, what changed since last time, and anything they said about budget, timing or who decides. Their words where it matters, not a summary of mine.
3. List every commitment made, by either side, with an owner and a date. Anything without a date gets **[date?]**.
4. Add the note to the client record and create the tasks against that client, assigned to me, due on the dates given.
5. Show me the note and the task list before you save anything. Never save on your own.

Never state a price, date or commitment that wasn't said in the meeting. Never invent a contact who wasn't there.

Step 5 is the one people delete first and regret. Keep it until you have watched it get twenty meetings right. Then decide.

Which CRMs and meeting tools connect to Claude today.

Three ways a tool connects. **In the directory** means you switch it on in Claude's settings, no developer. **Vendor server** means the vendor publishes its own connection and you add it yourself, ten to thirty minutes. **Via Zapier, Make or n8n** means no direct connection yet, so a middleman carries the data.

CRMs

TOOL	HOW IT CONNECTS	WHAT THAT GETS YOU FOR THIS JOB
HubSpot	In the directory	Reads and writes contacts, companies, deals, notes and tasks. The cleanest fit for the meeting-to-note job.
monday.com	In the directory	Boards and items. Works if your pipeline lives on a board rather than in a traditional CRM.
Attio	In the directory	Query and update records. Good for consultancies and agencies already on it.
Close	In the directory	Leads, contacts and activity. Sales-team shaped.
Salesforce	Vendor server	Salesforce publishes its own connection and an Agentforce integration. Listed as coming to the directory. Check before you build on it.
Dynamics 365 Sales	Vendor server	Microsoft's Dataverse connection. Pair it with the Microsoft 365 connector for Outlook and Teams.
Pipedrive	Via Zapier, Make or n8n	No first-party connection yet. Claude writes the note, the automation tool posts it.
Zoho CRM	Via Zapier, Make or n8n	Same as Pipedrive. Works, one more moving part.

Checked 14 September 2026 against the Claude connectors directory and vendor announcements. This list changes monthly. Before you build a workflow on any row, open Settings, then Connectors, in Claude and confirm the tool is there on your plan.

Where the transcript comes from.

The note is only as good as the transcript. Whatever you already use to record meetings is probably fine. What matters is whether Claude can reach it directly, or whether you paste it in.

Meeting recorders and transcripts

TOOL	HOW IT CONNECTS	NOTE
Fireflies	In the directory	First meeting tool listed. Transcript search and action items.
Fellow	In the directory	Agendas, notes and action items.
Granola	In the directory	Clean notes, paid plans. The one people who hate meeting bots tend to pick.
Grain, Circleback, Read AI	In the directory	All listed. Pick by which one you already pay for.
Zoom	In the directory	Listed as of August 2026. Was "coming soon" in April, so confirm on your own account.
Microsoft Teams	Via Microsoft 365	Where your tenant keeps transcripts, the Microsoft 365 connector can reach them. Otherwise download the transcript and paste it.
Google Meet	Via Google Drive	Meet transcripts land in Drive as Docs. The Google Drive connector reads them.
Otter, Fathom, tl;dv	Export and paste	Vendor connections exist or are coming for some plans. The reliable path today is export the transcript, paste it in.

If your tool isn't on either list

The standing instructions on page 7 work unchanged. Only the last step changes, from "save it" to "here it is, paste it in". You lose about ninety seconds a meeting and none of the value. Start there, and switch the connector on when it turns up.

Same date and caveat as the CRM list. Zoom in particular was "coming soon" in April and listed by August, so treat any row as a thing to confirm on your own account rather than a promise.

BEFORE YOU CLOSE THIS

Write it down.

Three lines. Not a plan. If it's not written down before you're in the car, it doesn't survive the drive home.

01

The job you'd hand over

02

Roughly how many hours a month it costs you

03

The day of the week it would run

Don't learn to build the tool. Ask the tool to build itself.

Feeling like there's a lot to put into practice?

You don't have to do it alone. Our AI Advisor service exists exactly for this: a low-cost way to get hands-on help turning what you learned today into real progress in your business.

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Don't put client data, staff records or anything commercially sensitive into a free consumer account. Use the paid business tier, where the provider commits in writing to not training on your content. Everything in this pack was demonstrated with initials and a made-up customer.

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