

DBR AI LEVERAGE LAB · FOUNDATION · FAST START · FULL-COLOR FIELD EDITION

AI for Reps: The Fast Start Playbook

Install your AI team, launch your command center, and turn saved time into more conversations.

Built to turn clear ideas into useful, responsible action.

Install your AI team, launch your command center, and turn saved time into more conversations. This edition preserves and organizes the supplied training material into an easy-to-study magazine experience.

01 · FIND THE SIGNAL

Use the source guidance to identify the ideas, prompts, examples, and decisions that can improve your next workweek.

02 · APPLY WITH JUDGMENT

Review all client-facing language, validate relevant facts, and keep human responsibility in every important decision.

03 · TURN IT INTO A HABIT

Take one useful idea from this guide and make it part of a repeatable rhythm rather than a one-time experiment.

08 · MAGAZINE PAGES

Designed for online reading, printing, discussion, and action inside the DBR AI Leverage Lab library.

DBR Learning Library AI for Reps — Fast Start

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AI FOR REPS The Fast Start Training Manual Your AI Team.
No Code Required.

This manual gives every DBR rep a complete, plug-and-play AI system in about one hour. You will not write a single line of code. You will not learn programming tools. You will install one app, add one plugin, connect the tools you already use, and start talking to your AI team in plain English. That's the whole system.

Part 1: The Big Idea Most AI training on the internet is built for programmers. Ours is not. Here are the three principles behind everything in this manual: • You don't build AI — you plug in — Your AI agents are already built. You install them with one click and use them by describing what you want, the same way you'd brief a great assistant. • Plain English is the interface — “Write a cold call script for a CFO.” “Prep me for my 10am.” “What's my plan today?” If you can describe it, your AI team can draft it. • AI multiplies activity, it doesn't replace you — A full morning of prospecting prep now takes 30 minutes. Reps who win with AI use the saved time to make more calls and have more conversations. The AI drafts — you dial.

Part 2: The Rep Stack (4 Pieces) Piece What It Is Time to Set Up

1. Claude Desktop App Your AI headquarters. Download from 5 minutes claude.ai/download and sign in.
2. DBR AI Agent Team One file from your team leader. Open it, click 2 minutes Plugin Install. All 4 agents added.

3. Connectors Gmail + Google Calendar (everyone); 10 minutes Calendly and Zoom if you use

3. Connectors Gmail + Google Calendar (everyone); 10 minutes Calendly and Zoom if you use them. Two-click sign-ins.

4. Scheduled Tasks Your 6am morning briefing, set up with one 5 minutes sentence.

Part 3: Meet Your AI Agents

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Sales Genie — C-Suite Outreach & Booking Writes cold-call openers, voicemails, LinkedIn messages, and follow-up emails in the proven DBR “apples-to-apples” voice, and coaches you through objections in real time. • “Write a cold call script for a CFO at a trucking company.” • “He said ‘send me something’ — what do I say back?” • “Draft a follow-up email after my call with ABC Manufacturing.”

Recruiting Genie — Grow Your Team & Overrides Turns the multiple-streams-of-compounding-recurring-income story into recruiting messages, posts, and objection answers, tailored to whoever is in front of you — insurance agent, CPA, financial pro, or entrepreneur. • “Write a recruiting DM for an insurance agent.” • “Explain the four pillars to a CPA.” • “She said she has no time — handle the objection.”

Dreams Fast Start OS — Your Daily Command Center Your personal dashboard: live calendar and prioritized inbox, pipeline, goals, and the built-in 12-Week-Year Game Plan workbook. One screen that answers “what matters today?” • “Build my Dreams Cowork OS.” • “Set up my Game Plan for the next 12 weeks.”

Industry Dashboard Builder — Channel Partner Demos Builds a polished, white-label AI Command Center demo for any industry in minutes — the perfect show-and-tell when opening a channel partner or recruiting a new team. • “Build a command center for a solar sales team.”

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Part 4: Setup — Six Steps, About One Hour

1. Download the Claude Desktop App (5 min) — Go to claude.ai/download, install, and sign in. This is your AI headquarters.
2. Install the DBR AI Agent Team Plugin (2 min) — Get the plugin file from your team leader or the DBR resource page. Open it — Claude shows an Install button. Click it once.
3. Connect Your Tools (10 min) — In Settings > Connectors, connect Gmail and Google Calendar, plus Calendly and Zoom if you use them. Each is a two-click sign-in.
4. Build Your Command Center (10 min) — Type: “Build my Dreams Cowork OS.” Claude assembles your dashboard wired to your own calendar and inbox, Game Plan tab included.
5. Turn On Your Morning Briefing (5 min) — Type: “Every morning at 6am, review my calendar and inbox and give me a briefing with my top 3 priorities.” Click “Run now” once to approve it.

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6. Run Your First Play (10 min) — Pick one real prospect and say: “Write a cold call opener and voicemail for [name], the [title] at [company].” Read it, tweak it, then pick up the phone.

Part 5: The Daily Rhythm Morning — Briefed Before Breakfast

Your 6am briefing is waiting: today’s meetings, who needs a reply, your top 3 priorities. Then: “Prep me for my 10am with ABC Manufacturing.” Walk into every call knowing more than the other guy.

Midday — Prospect at Full Speed

“Write outreach for these 5 prospects.” “He didn’t answer — give me the voicemail.” “Draft the follow-up with my Calendly link.” What used to take an afternoon now fits between appointments.

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Evening — Close the Loop “Recap today’s Zoom call and draft the follow-up.” “Who did I promise something to today?” “Score my week on the Game Plan.” Nothing slips through the cracks.

Part 6: The One-Hour Team Training (Leader’s Agenda) Time Segment What Happens

0:00–0:10 The Why The retirement crisis, linear pay vs. recurring income, and why AI leverage is the newest pillar. AI doesn’t replace effort — it multiplies it.

0:10–0:25 Live Setup Everyone installs the app and plugin and connects Gmail + Calendar together, live. Nobody moves on until everyone’s green.

0:25–0:40 First Plays Every rep runs three prompts on a real prospect: cold call script, objection rebuttal, follow-up email. Read the best out loud.

0:40–0:50 Command Center Everyone types “Build my Dreams Cowork OS” and turns on the 6am briefing. Show the Game Plan tab; set the first 12-week goal.

0:50–1:00 The Commitment Issue the 7-Day Challenge (below). Book the follow- up call where results get reported.

The 7-Day Challenge 1. Read your 6am morning briefing every day before checking your phone. 2. Send 5 AI-drafted outreaches (reviewed and personalized by you) to real prospects. 3. Book at least 1 appointment using an AI-prepped call.

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4. Report your numbers at the next team call.

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Part 7: Rules of the Road • AI drafts, you send — Every message goes out under your name. Read it, make it yours, then send. Nothing reaches a prospect that you haven't personally reviewed. • Verify numbers and claims — AI is a brilliant assistant, not a compliance officer. Any figure, product detail, or income statement must match approved DBR materials before it goes out. • The phone still wins — AI gets you ready 10x faster — it doesn't dial for you. Measure your week in conversations booked, not messages generated.

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The advantage appears when the lesson becomes a habit.

Choose one idea from this guide, put it into a real workflow this week, and review it in your own voice and judgment.

ONE DECISION · ONE ACTION · ONE BETTER WEEK