

DBR AI LEVERAGE LAB · FOUNDATION · STARTER SYSTEM · FULL-COLOR FIELD EDITION

The AI Leverage Starter Guide

Build practical prompts, playbooks, and workflows that compound daily.

Built to turn clear ideas into useful, responsible action.

Build practical prompts, playbooks, and workflows that compound daily. 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.

17 · MAGAZINE PAGES

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

AI Starter Guide — ExpandedDBR AI Accelerator

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AI STARTER GUIDE Expanded Student Handout + Prompt
Playbook Learn it. Use it daily. Build workflows. Keep
improving.

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AI Starter Guide — ExpandedDBR AI Accelerator

Start Here — Upgrade the Operator First AI is not magic and it is not your replacement. AI is leverage. The person who learns to think clearly, ask better questions, build repeatable workflows, and review the output carefully gets the advantage. The New Rule: You will not be replaced by AI alone. You can be outpaced by people who use AI better than you do. • Your role: AI drafts, researches, organizes, analyzes, and accelerates. You bring judgment, relationships, strategy, compliance, and final approval. • The goal: use AI to save time, improve follow-up, create better content, prepare better presentations, and serve more people with less friction. • The standard: don't chase shiny tools. Build real capability — prompts, notes, workflows, playbooks, and daily repetition.

YOUR FIRST 10 MINUTES: Open Claude (claude.ai) or ChatGPT (chatgpt.com) right now and paste this — “You are my writing assistant. I'm a [my role] serving [my market]. Rewrite this rough note into a warm, professional follow-up text under 80 words, ending with an easy question: [paste your rough note].” Read it, change one word, send it. That's your first win — and proof this is for you.

This guide is for independent producers, business owners, sales professionals, and DBR partners who want practical AI leverage for prospecting, follow-up, presentations, training, and operations.

Field Notes 02

Why AI Leverage Matters Now AI is becoming a business capability, not a novelty. The winners aren't using AI for fun questions — they're using it to increase speed, capacity, consistency, communication, and decision-making. Signal What it means 17–20% Overall U.S. business AI use, Dec. 2025 – May 2026. 20–23% Businesses expecting to use AI within the next six months. 46% Small employer firms where the business or employees currently use AI. 71% AI-using small firms reporting increased productivity. 39% AI-using firms reporting improved quality of goods/services. 31% AI-using firms reporting higher sales.

- Reality check: waiting has a cost — slower response, slower execution, more manual labor per task, weaker data use, lost ground. • Opportunity: leverage creates more output per hour, more personalized follow-up, faster learning, better content, stronger workflows, and more time for relationships and revenue. Source note: U.S. Census Bureau Business Trends and Outlook Survey; Federal Reserve Small Business Credit Survey; Microsoft Work Trend Index. Directional training signals, not guarantees of individual results.

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Field Notes 03

The Human Intelligence OS Advantage AI is more powerful when the human using it can see patterns, systems, and next steps. Better perspective creates better prompts; better prompts create better outputs; better outputs create better execution. • Ground level — sees what's directly in front of you; reacts to immediate problems; limited context. Uses AI for answers. • Drone view — rises above the moment; sees patterns, relationships, risks, and options. Uses AI for research and organization. • Satellite view — sees systems, incentives, timing, and leverage points. Uses AI to build systems, automate workflows, and design better execution. Training line: perspective up = intelligence up = better decisions = more leverage.

The 5-Step Learning Stack (Make It Stick) 1. See the map — use the infographic or framework first so learners see the big picture. 2. Add a story — an analogy or business example makes the idea emotionally memorable. 3. Summarize it — a short one-page recap gives structure and depth. 4. Teach it back — explain it in your own words; recall locks it in. 5. Space the review — repeat later with a new example so the memory strengthens.

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Field Notes 04

Step 1 — Set Up Your AI Tools (about 30 minutes) Start free. Sign up, then keep the mobile apps handy. Tool (free to start) Use it for ChatGPT — chatgpt.com Fast brainstorming, writing, voice practice, research support, drafts, role-play. Install the mobile app. Claude — claude.ai Longer writing, strategy, documents, training materials, analysis, polished communication. NotebookLM — Turn YOUR documents into summaries, study guides, podcasts, notebooklm.google.com briefing docs, and quizzes. Manus — manus.im Bigger multi-step projects: planning, research, web work, documents. (Verify its current status before you rely on it.) Claude Cowork — in the Claude Connected workflows: inbox triage, calendar briefings, scheduled desktop app prompts, real-file work. Needs a paid Claude plan; scheduled tasks run only while the app is open. Your Prompt Library — your Drive One running document where you save every prompt, workflow, and or Notes example that works.

★ Tool rule: Use free tools to learn. Upgrade only when a tool clearly saves time, produces better work, or supports a workflow you actually use.

Your Biggest Shortcut — Build a Master Prompt Once THE ONE THING MOST PEOPLE MISS: A Master Prompt (start with the simpler Business Brief) is one reusable block that teaches AI everything about you — who you serve, what you sell, your goals, your voice, and your rules — so you never re-explain yourself and every answer comes back personalized and on-brand.

Field Notes 05

Build it once, paste it into a Claude Project (or the top of any chat), and start requests with “Using my Master Prompt above, ...”. Cover six blocks: • Who you are — role, industry, experience, what you're known for. • What you sell — products/services and the real problems they solve. • Your ideal client — who you serve best and what keeps them up at night. • Your goals — what you're growing this quarter and this year. • Your voice & style — tone, plus a real writing sample so AI sounds like you. • Your rules — compliance lines and what AI must never do on your behalf.

★ Fastest way: Answer those six out loud, paste your answers into AI, and say “Turn this into a clean Master Prompt I can reuse.” Then save it. (Full walkthrough in the Master Prompt Guide.)

Step 2 — The 6-Part Prompt Formula The starter formula, upgraded. Hit all six and the answer nails it.

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6. ROLE — who should AI act as? (e.g. experienced B2B benefits consultant) 7. CONTEXT — who is this for and what's happening? Give enough background. 8. TASK — exactly what do you want done? Write, analyze, compare, summarize, plan, or coach. 9. FORMAT — how should it be delivered? Text, table, bullets, script, email, checklist. 10. VOICE — how should it sound? Warm, plain English, professional, concise, no hype. 11. GUARDRAILS — what should it avoid? No guarantees, no sensitive data, verify facts, stay compliant. Weak prompt: “Write a follow-up text.” Strong prompt: give role, context, task, format, voice, and guardrails. Same tool — completely different result.

Field Notes 06

If Your Output Is Weak, Check These 4 Things

- 12.No role — you didn't tell it who to be.
- 13.No context — it doesn't know your client or situation.
- 14.Too vague — the task or format wasn't specific.
- 15.You stopped at draft one — you didn't coach it (shorter, warmer, three versions).

★ Teach AI your voice: Paste 3–5 sentences you've actually sent a client and say “Match this voice.” It's the single biggest driver of “this sounds like me.”

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Field Notes 07

Step 3 — Your First 10 Prompts Copy, paste, customize the brackets. Use case Prompt Marketing assistant You are my marketing assistant. I'm a [role] serving [market]. Write 5 short social posts that show my expertise without being salesy. Friendly, plain English, one useful idea per post, one question at the end. Email reply Summarize this email thread into 3 bullet points, identify the real ask, and draft a short professional reply in my voice: [paste thread]. Objection response I keep hearing this objection: [objection]. Give me 3 responses — one logical, one emotional, one story-based. Each under 70 words, no pressure. Coach mode Act as my business coach. Here's my goal: [goal]. Ask me 5 tough questions, one at a time, to pressure-test my plan and reveal blind spots. Follow-up text You are an experienced [role]. My prospect is [context]. Write a warm follow-up text that re-opens the conversation without pressure. Under 80 words. End with a simple question. Social proof story Turn this win into a short story I can share without hype: [paste win]. Make it about the problem, the insight, the action, and the result. Keep it compliant and non-specific. Sales role-play Role-play as a skeptical but respectful business owner. I'll practice explaining [solution]. Push back with realistic questions and coach me after each answer. Meeting prep I'm meeting with [person/company]. Based on this info [paste notes], give me a 10-minute prep brief: likely concerns, 5 smart questions, and a simple opening. Training recap Turn these notes into a 1-page class recap with: big idea, 5 key points, 3 action steps, 5 fill-in-the-blank quiz questions, and homework. Workflow builder Help me turn this repeated task into a workflow: [describe task].

Break it into steps, show where AI can help, create the prompt, and list what a human must verify.

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Field Notes 09

Prompt Library — DBR Use Cases Use case Prompt Life insurance You are an experienced life insurance agent. My client is [one sentence]. Write a warm follow-up text that re-opens the conversation without pressure. Under 80 words.

Term vs whole Explain term vs whole life to a 28-year-old who has never bought insurance. Use one simple analogy. Under 150 words. End with the question they should ask next.

Real estate listing Turn these bullets into a listing description that sells the lifestyle, not just the features: [paste bullets]. 120 words max. Warm, specific, not cheesy.

Past buyers Write a friendly check-in email to past buyers I haven't spoken to in a year. Mention a free home-value update. Warm, no pressure, under 150 words.

Loan officer You are a loan officer. Compare [program A] vs [program B] for [buyer situation] in a short client-friendly table, then add a 2-sentence recommendation.

B2B owner Research the top challenges [industry] owners face right now with costs, retention, and cash flow. Give me 5 useful conversation starters.

Group health Act as a benefits consultant. Explain how an employer might reduce healthcare costs and improve benefits without making promises. Plain English and 5 discovery questions.

Tax credit intro Write a short email to a business owner on why it may be worth reviewing R&D tax credits, FICA tip credits, or payroll tax savings. Educational, not salesy.

Partner recruiting Write a short invitation for [audience] to learn how DBR helps agents add B2B solutions and recurring income. Professional, exciting, no hype.

Presentation builder Turn this topic into a 7-slide training outline with title, key idea, speaker notes, and one audience question per slide: [topic].

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Step 4 — Build Your AI Playbook (Habits That Compound) •
 Daily (10 min) — use AI for one real task: an email, a text, a call script, a summary, a social post, or one idea you can use that day. • Before sending — read it out loud. If it doesn't sound like you, coach the AI with a writing sample and ask for warmer/shorter/clearer. • Save your winners — keep a document called “My AI Playbook.” Save prompts that worked, improved responses, and best follow-ups. • Weekly (class day) — show up live, share one win, ask one question, complete the practice assignment. Consistency beats motivation. • Teach back — after a training, explain the top 3 ideas to someone or record a 60-second voice note. If you can explain it, you own it. • Space it — revisit important prompts on Day 2, 7, 14, and 30. Spacing turns exposure into retention. The stack: Infographic = mental map. Story = memory hook. Notes = structure. Flashcards = retrieval. Teach-back = mastery. Spacing = long-term retention.

The Note-Taking Upgrade — Don't Just Write It, Work It •
 Capture — write the key idea. • Compress — summarize it in your own words. • Connect — link it to something you already know. • Question — turn the idea into a recall question. • Recall + apply — close the notes, answer from memory, then use it in a real task.

Field Notes 11

Step 5 — From Prompts to Workflows (Where AI Really Pays)

A prompt gets one answer. A workflow creates a repeatable business result. The real money isn't one clever prompt — it's repeatable processes for prospecting, follow-up, training, service, operations, and content. Every workflow has four parts: 16.Trigger — what starts the work? New lead, unread email, class notes, proposal request. 17.Inputs — what info does AI need? Notes, transcript, website, CRM fields, emails. 18.AI task — what should AI draft, summarize, compare, plan, or organize? 19.Human review — what must you verify? Facts, compliance, tone, pricing, client details.

★ Example workflow: After every Zoom training, paste the transcript and ask AI for a 1- page recap, 5 social posts, 5 follow-up texts, a quiz, and 3 action steps. Review, edit, save the best prompts, reuse next week.

Agentic thinking: as you advance, tools like Claude Cowork and Manus handle multi-step projects — plan the work, use tools, take action, deliver a result, and check with you before anything sensitive.

Inbox & Follow-Up Starter Workflows “Scan my unread email and tell me the 5 that actually need me today. Put them in priority order and explain why.”

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“Draft replies to these three emails — friendly, short, professional, and in my voice. Leave room for me to verify details.” “Summarize my calendar and flag the priority emails for today. Give me a 5-minute plan.” “Every weekday morning, review my calendar and inbox, list my 5 priority emails, then draft personalized follow-ups for prospects I haven't contacted in 7+ days. Leave drafts for approval.”

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Field Notes 12

Golden Rules — Draft Fast, Approve Carefully • Protect client data — never paste SSNs, account numbers, private health details, full policy numbers, or sensitive records into an AI tool. • AI drafts, you approve — you're responsible for what you send. Review for accuracy, compliance, tone, claims, and client fit. • Verify current facts — don't trust AI for current rates, laws, carrier details, tax rules, or product specifics without checking the source. • No false certainty — avoid guarantees or statements that sound more certain than the facts support. • Use human judgment — AI helps you move faster; it can't replace relationship judgment, ethics, or your professional standards. • Iterate — if the first answer is mediocre, coach the tool: shorter, warmer, clearer, less salesy, more specific, or three versions.

★ On disclosure: You don't need to announce that you used AI — but you own every word as if you wrote it yourself.

Compliance-Friendly Language Use this Avoid this “May help reduce costs” “Will reduce costs” “You may qualify” “You are guaranteed to qualify” “Let's review the facts” “This definitely applies” “Based on current information” “AI said it's true” “Here are options to consider” “This is the only right answer”

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Field Notes 13

30-Day Starter Plan — Turn Learning Into Capability • Week 1 — Learn the basics: set up tools, practice the 6-part formula, use AI for 5 simple tasks. • Week 2 — Build your voice: give AI writing samples; create better follow-up texts, emails, and social posts. Draft your Master Prompt. • Week 3 — Build your playbook: save your 10 best prompts; create a folder for scripts, emails, examples, and workflows. • Week 4 — Build a workflow: turn one repeated task into a repeatable AI workflow with human review built in.

★ Minimum win by Day 30: 10 saved prompts, a working Master Prompt, 3 reusable follow-up templates, 1 workflow you use weekly, 1 training-recap system, and the habit of asking AI to help before starting from scratch.

Quick Glossary Term Plain English Prompt What you type or say to the AI. Better prompt = better result. Master Prompt / Business Brief One reusable block of context about you that you load once so every answer is personalized. Chatbot AI you talk to, like Claude or ChatGPT. Agent AI that can do multi-step work, use tools, and produce a result. Workflow A repeatable process that uses AI to create a business result. Project A workspace that stores context, instructions, files, and examples. Hallucination When AI states something false with confidence. Why you verify. Context window How much information the AI can consider at one time. Retrieval practice Pulling information from memory instead of only rereading it. Human review The final check before anything goes to a client, prospect, or audience.

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Field Notes 14

Student Worksheet — Use This During Class My Top 3 Use Cases 1.

_____ 2.
 _____ 3.
 _____ My

Best Prompt So Far Role:

Context:

Task:

Format:

Voice / Guardrails:

_____ My

First Workflow Trigger:

Inputs:

_____ AI

task:

Human review:

How often will I use it?

Fill-in-the-Blank Review Quiz Active recall beats passive review. Cover the answer key and try from memory. 20. Most people were taught what to learn, but not _____ to learn. 21. AI is your assistant, not your _____. 22. A good infographic creates a mental _____. 23. Active recall means pulling information from _____. 24. Spacing means spreading learning out over _____. 25. Repetition creates familiarity; retrieval creates _____. 26. Ground-level thinking reacts; satellite-level thinking designs the _____. 27. A prompt gets one answer; a workflow creates a repeatable business _____. 28. Never paste sensitive client _____ into an AI tool. 29. The winners learn to think, decide, and execute with _____. Answer Key 1. how · 2. replacement · 3. map · 4. memory · 5. time · 6. retention · 7. system · 8. result · 9. data · 10. AI leverage

See you in class. Bring a win.

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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