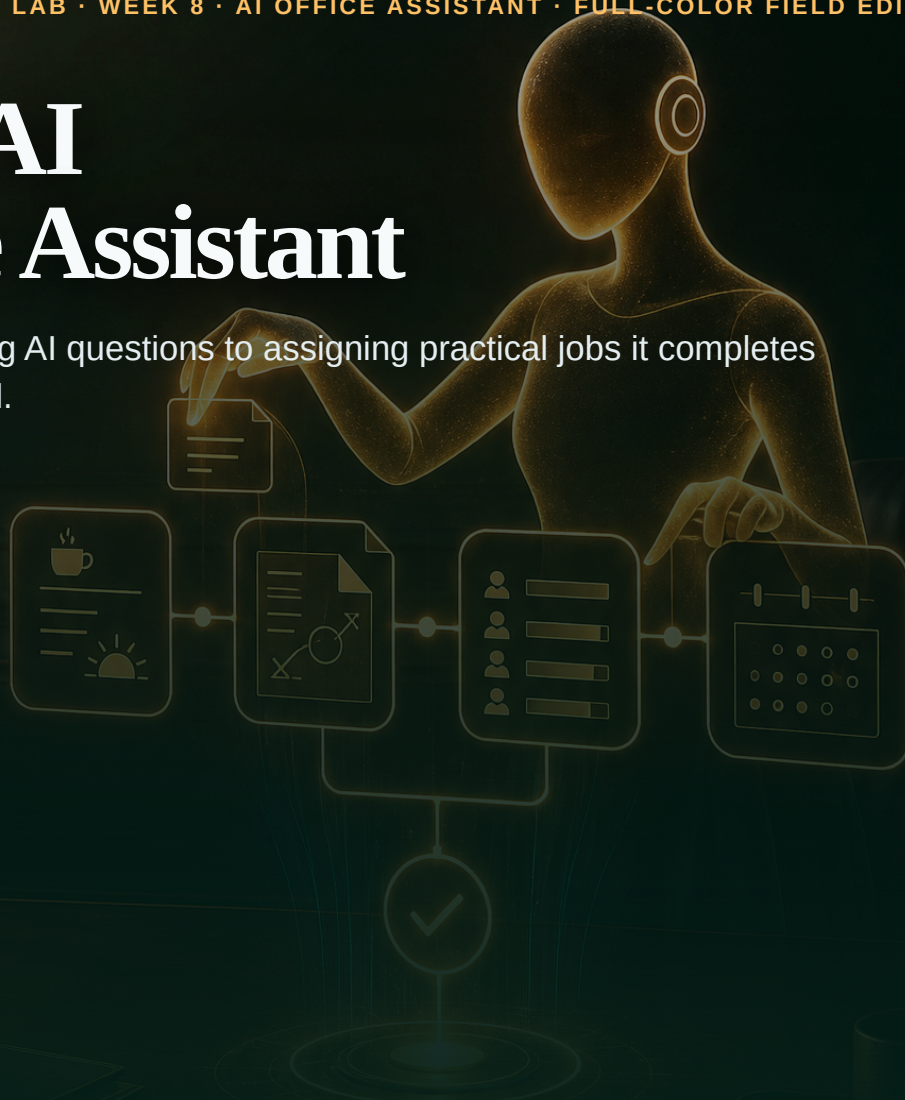


DBR AI LEVERAGE LAB · WEEK 8 · AI OFFICE ASSISTANT · FULL-COLOR FIELD EDITION

Your AI Office Assistant

Move from asking AI questions to assigning practical jobs it completes for your approval.



Built to turn clear ideas into useful, responsible action.

Move from asking AI questions to assigning practical jobs it completes for your approval. 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.

12 · MAGAZINE PAGES

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

Field Notes 01

Your AI Office Assistant The 3 Levels of Claude Automation — and how to set up your first one today. Stop asking AI questions. Start giving it jobs.

THE BIG IDEA Everything you've done so far has been you and AI in conversation: you ask, it answers, you copy the result out. That's powerful — but you're still doing the work of driving. This week AI stops chatting and starts working. You give it a job, it does the job, and it hands the result back for your approval. The difference is the difference between an assistant who talks and an assistant who gets things done. By the end of class you'll have one real automation running.

THE 3 LEVELS OF CLAUDE AUTOMATION Think of it as a ladder. You already own Level 1. Today you climb to Level 2 — where the hours come back. Level 3 is the horizon; you don't need it to win.

Level What it is Your role What it's for

1 — Chat Ask and refine You draft it Writing, thinking, drafting.

2 — Co-Work Give it a job You approve it Real tasks: docs, spreadsheets, briefings, scheduled routines. TODAY.

3 — Claude Code Build in plain English It builds it Advanced. Custom tools. Not required — just possible.

★ Where you are You're climbing from Level 1 to Level 2 today. Don't skip ahead. Master giving AI jobs before you think about Level 3 — most producers never need to leave Level 2 to double their output.

Level 1 — Chat: You Draft It You already live here. It's the foundation, and it's what makes Level 2 work. Three things worth locking in:

Field Notes 02

Set up your project One home that holds your context, your files, and your past work — so you're not starting cold every time.

Build your master prompt Teach it once who you are, who you serve, and how you sound. Paste it at the top of any job and it writes like you instead of like a robot.

Turn a good instruction into a habit The prompt you keep retyping? Save it. Next time it's one click, not a paragraph.

★ The rule of Level 1 The better your master prompt, the less you explain every single time — and the better Level 2 performs when it does the job for you.

Level 2 — Co-Work: You Approve It Today's climb. You give it a job in plain English; it works, then waits for your yes. Three moves:

Move How to do it

Set the task Brief it like you'd brief an assistant — plain English, the outcome you want.

Connect email + calendar Settings ► Connectors ► Gmail. Now it can see your meetings and inbox.

Walk away It handles the small stuff on its own and checks in when it needs a decision.

Field Notes 03

Your First Automation: The Morning Briefing The one automation every producer should have. Set it once — it runs every morning before you sit down. Copy this. Paste it into Cowork. Change nothing but the time if you like. “Every weekday at 7am, check my calendar and email. Give me a one-page briefing: today’s meetings with who I’m meeting, the 5 emails that need a reply, and any prospect I said I’d follow up with. Draft the replies — don’t send them.” That’s it. It preps your day while you’re still making coffee. You walk in to a briefing and a set of drafts — you just review and approve.

Two more jobs to try this week Messy notes → a clean proposal “Here are my rough notes from a client call. Turn them into a clean one-page proposal in my voice: their situation, what I recommend, and the next step. Leave the price blank for me to fill in.”

A pipeline tracker from scratch “Build me a spreadsheet to track my prospects: name, source, stage, last contact, next step, and a follow-up date. Make the overdue follow-ups easy to spot.”

★ Start with the annoying task Pick the job you dread most — the one that eats your afternoon. That’s the one worth handing off first. The relief is the whole point.

Safe By Design This is the part that lets you trust it. Cowork is built so you stay in control.

! It drafts — you approve By default Cowork does NOT send email on its own. It writes the draft and waits. Nothing goes out until you hit send. You are always the last step.

Field Notes 04

Scheduled tasks: the one catch Your morning briefing runs while your computer is awake and the Claude desktop app is open. If the app is closed at 7am, the task runs the next time you open it — it doesn't fire on a closed laptop. Leave the app running overnight if you want it waiting for you.

! Never paste sensitive client data No Social Security numbers, account numbers, private health details, or full policy numbers — ever. Not into Cowork, not into any AI tool.

And the rules that never change: • Verify current facts — rates, laws, carrier details, product specifics — before you act on anything it gives you. • No false certainty. Never let it make guarantees or claims you couldn't back up yourself. • You are responsible for everything you send. Review for accuracy, compliance, tone, and client fit.

Level 3 — Claude Code: Where It Can Go You do NOT need this to win. It's here so you know the horizon exists. At Level 3, you describe a tool in plain English and it gets built — a custom tracker, a system that connects one thing to another, a whole workflow. No coding background required. It's real, it's powerful, and it's completely optional. Master Level 2 first. When you outgrow it, Level 3 will be waiting.

Homework: Set Up ONE Automation Doing beats watching. This is the aha week — if you do only one thing all program, do this.

Field Notes 05

THIS WEEK Connected email + calendar (Settings ► Connectors)

Set up my morning briefing — scheduled for

Ran one real job (proposal / spreadsheet / files)

The job I handed off first was

One minute (or hour) I got back this week

Golden Rules • Climb one level at a time. Own Level 1, then live in Level 2. • Give it a job, not just a question. That's the whole shift this week. • It drafts, you approve. You always hit send. • Leave the app open for scheduled tasks to run. • Never paste sensitive client data into any AI tool. • Verify current facts before you act. No guarantees you can't back up. • Start with the task you dread. That's where the hours are hiding.

Top 10 Cowork Automation Prompts Copy-and-paste jobs for your AI office assistant. Built for Dreams reps — consultant entrepreneurs reaching business owners and decision-makers. Every one drafts; you approve.

★ How to use these Paste your Business Brief (or master prompt) first, then the prompt. Cowork writes in YOUR voice, does the work, and saves drafts for your review. Change the bracketed parts to fit your week.

! Read before you run any of these Cowork drafts — it does NOT send on its own. You review and hit send. Never paste sensitive client data (SSNs, account numbers, health details, policy numbers). Verify facts before you act. For any texting, get proper written consent first (TCPA).

Clean Up The Inbox

1. Catch the Ones You Missed “Scan my inbox from the last 10 days

1. Catch the Ones You Missed “Scan my inbox from the last 10 days. Find every email from a real person that I never replied to — skip newsletters, receipts, and automated notices. List them oldest first: sender, company, subject, a one-line summary, and how urgent it looks. Don't reply yet — just give me the list so I can decide.” Why it works: The follow-up you forgot is the deal you lost. This surfaces the ones that slipped through before they go cold.

2. Load 30 Follow-Ups Into Drafts “Go through my sent mail and find the last 30 people I emailed who never wrote back. For each, write a short, warm follow-up in my voice: reference our last exchange, add one new reason to reconnect, and end with an easy question. Save all 30 as drafts. Do not send.” Why it works: Thirty personalized follow-ups in the time it takes to get coffee. You just review and send the ones that matter.

3. Reactivate Dead Pipeline “Find everyone I emailed 60 to 120 days ago who went quiet after showing interest. Draft a no-pressure re-open in my voice — a genuine check-in, one useful thought, and a soft door back in. Save as drafts, oldest lead first.” Why it works: Reactivating cold pipeline is the fastest win in sales — these are people who already raised a hand once.

Targeted Outreach Batches

4. 20 Openers for Customs Brokers “Here's a list of 20 customs brokers [paste names + co

4. 20 Openers for Customs Brokers “Here's a list of 20 customs brokers [paste names + companies — or: research 20 customs brokerage firms in {region} and list them first]. For each, draft a short B2B outreach email introducing how Dreams helps businesses like theirs lower costs and add new revenue streams — apples-to-apples, no hype, one clear next step. Personalize the opening line to their company. Save all 20 as drafts.” Why it works: Bulk personalization at a scale you can't do by hand — but every email still sounds hand-written.

5. 20 Openers for Import Businesses “Draft 20 outreach emails to import/export business owners [paste your list, or research 20 importers in {industry/region}]. Speak to their world — tariffs, tight margins, cash flow, keeping good employees. Introduce how Dreams helps them save and grow without changing what's working. Keep it short and human. Personalize each opener. Save as drafts.” Why it works: Speaks the prospect's language, not yours. Relevance is what gets a C-suite reply.

6. Warm Up Referral Partners “Here are my referral partners — CPAs, brokers, financial pros [paste list]. Draft a brief, genuine check-in to each: no ask, just staying top of mind, plus one thing that might help their clients. Save as drafts so I can add a personal line before sending.” Why it works: Referral partners send you business when you stay visible. This keeps you in front of them without it feeling like work. RUN YOUR DAY ON RAILS

7. The 7AM Morning Briefing “Every weekday at 7am, check my calendar and email

7. The 7AM Morning Briefing “Every weekday at 7am, check my calendar and email. Give me a one-page briefing: today's meetings and who I'm meeting, the 5 emails that need a reply, and any prospect I said I'd follow up with. Draft the replies — don't send them.” Why it works: You walk into your day already prepped, with replies waiting. Set it once; it runs every morning.

8. Meeting Prep Before Every Call “Before each of tomorrow's meetings, pull what we know about the person and their company from our email history. Give me a one-page brief per meeting: who they are, what we last discussed, three talking points tied to Dreams, and two smart questions to ask.” Why it works: Walk into every call sounding like you did an hour of homework — because your assistant did.

9. Turn This Week's Conversations Into Content “Look at the questions prospects and clients asked me this week over email. Pick the 3 best and draft a short LinkedIn post for each — a real question, a plain-English answer, and a soft invitation to talk. Keep my voice. Save as drafts for me to review.” Why it works: Every question a prospect asks is content someone else is Googling. This turns your inbox into a content engine.

10. The Friday Pipeline Digest “Every Friday at 4pm, summarize my week: who I reached out to, who replied, who's still waiting on me, and the 5 people I should prioritize Monday morning. Then draft Monday's first 5 follow-ups so I start the week ahead.” Why it works: You close the week knowing exactly where everything stands — and open Monday with momentum instead of a blank screen.

Field Notes 09

THE RULES THAT MAKE IT SAFE • It drafts, you approve. You are always the one who hits send. • Leave the Claude app open for scheduled jobs (morning briefing, Friday digest) to run. • Never paste sensitive client data into any AI tool — no SSNs, account or policy numbers, health details. • Personalize before you send. Add one real line only you would know. • Verify current facts — plan details, tax rules, carrier specifics — before acting. • No guarantees or claims you can't back up. You own everything you send. • For texting or calling from a list, confirm you have proper consent first.

Pick ONE this week. Set it up. Let it work while you sell.

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