

DBR AI LEVERAGE LAB · 12-WEEK ACCELERATOR · FULL-COLOR FIELD EDITION

The AI-Powered Producer

A 12-week path from first prompts to a complete business operating system.

Built to turn clear ideas into useful, responsible action.

A 12-week path from first prompts to a complete business operating system. 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.

19 · MAGAZINE PAGES

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

Field Notes 01

DBR AI ACCELERATOR The 12-Week AI Training for
Independent Producers Life Insurance • Real Estate • Lending
• Entrepreneurs • DBR B2B Agents

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Program Philosophy Most AI training online teaches people to build tools, write code, or start AI agencies. This program does the opposite. It teaches working producers how to USE AI to do the three things that actually pay: prospect more people, follow up better, and get hours back every week through automation. Nobody graduates as a programmer. Everybody graduates with working systems running inside their own business. The model is simple: one skill per week, demonstrated live, applied as homework before the next class. By Week 12, each student has built a complete AI-powered operating system for their business — and seen firsthand what becomes possible when independent producers add leverage to what they already do well.

Who It's For • Life insurance agents — lead follow-up, policy explanations, client reviews, recruiting. • Real estate agents — listing descriptions, buyer/seller nurture, market reports, open-house follow-up. • Loan officers — pre-approval follow-up, program comparisons, referral partner outreach. • Entrepreneurs and small business owners — content, customer communication, admin automation. • DBR B2B agents — everything above, plus prospecting business owners for B2B group sales.

Field Notes 02

Weekly Class Format (45–60 minutes) • Wins & recognition (5 min) — students share results from last week's homework. Recognition drives retention; celebrate every win publicly. • Teach (10–15 min) — one concept, explained in plain English with industry examples. • Live demo (20–25 min) — Mike or a guest builds it live, on screen, no slides-only theory. • Homework + Q&A (10 min) — one specific assignment due before next class. Recommended rhythm: same day, same time every week. Record every session and load recordings into a shared NotebookLM notebook so students can ask the class questions later (this also demos the tool).

The Tool Stack • Claude (claude.ai) — primary thinking partner: writing, strategy, scripts, analysis. Projects keep each student's business context loaded. • Claude Cowork — the automation layer: works with real files, builds documents/spreadsheets/decks, runs scheduled tasks like daily briefings. • ChatGPT — second opinion, voice mode for practicing scripts and role-playing objections, image generation. • Manus — autonomous agent for bigger delegated jobs: market research reports, slide decks, simple web pages from one prompt.

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- NotebookLM — the learning engine: upload carrier guides, contracts, training recordings; get audio overviews, flashcards, quizzes, and a tutor that only answers from YOUR documents. Students need only free accounts for Weeks 1–6. Paid upgrades are introduced only when the student is already getting results.

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The 12 Weeks at a Glance Wk Topic Tool Focus Outcome

1 AI Foundations: Your New Unfair Claude + ChatGPT
Accounts set up, first real Advantage prompts, mindset reset

2 Prompting Like a Pro & Your Claude Projects Reusable
business brief that Business Brief supercharges every prompt

Field Notes 03

3 Prospecting I: Ideal Clients & Claude, ChatGPT Written ICP
+ niche list + research Market Research workflow

4 Prospecting II: Outreach That Claude, ChatGPT Personal
outreach library (email, Gets Replies DM, phone)

5 Follow-Up Machines Claude, Cowork 30-day follow-up
system + objection library 6 Content & Social Media at Scale
Claude, ChatGPT 30 days of content from one hour of work

7 NotebookLM: Become the Expert NotebookLM Personal
knowledge base + audio Faster learning habit

8 Claude Cowork: Your AI Office Claude Cowork Documents,
spreadsheets, and a Assistant scheduled daily briefing

9 Manus & AI Agents: Delegate Manus First delegated project
(report, Whole Projects deck, or page)

10 Client Experience: Meetings, All tools Meeting-prep +
follow-up workflow Proposals, Reviews

11 Your AI-Powered Week All tools Personal operating system
+ time audit

12 Scale: New Income From What All tools Growth plan + the
B2B division You Now Know opportunity

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Field Notes 04

Week-by-Week Plan Week 1 — AI Foundations: Your New Unfair Advantage Tool focus: Claude + ChatGPT (free accounts) Goal: Every student leaves with accounts created, one real business task completed with AI, and the belief that this is for THEM — not just for techies. Teach (10–15 min): What AI actually is (a brilliant assistant, not a robot replacing you). Chatbots vs. agents. Why top producers in every industry are quietly adopting this now. The #1 rule: garbage in, garbage out — AI is only as good as what you tell it. Live demo (20–25 min): Set up Claude and ChatGPT live. Then one demo per industry: rewrite a life insurance follow-up text, write a listing description from bullet points, draft a loan program comparison email, summarize a long client email thread into action steps. Homework (the One Win assignment): Use AI for one real task in your business every day this week (7 tasks minimum). Bring your best result to share next week. Leader note: Keep it inspiring and simple. The goal is daily usage habit, not mastery. End with a story of a producer saving 5+ hours/week.

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Field Notes 05

Week 2 — Prompting Like a Pro & Your Business Brief Tool
focus: Claude (introduce Projects) Goal: Students learn the 4-part prompt formula and build a reusable Business Brief so every future prompt is personalized to their business. Teach (10–15 min): The 4-part formula: ROLE (who AI should act as) + CONTEXT (your business, your client) + TASK (exactly what you want) + FORMAT (how you want it delivered). Why the Business Brief — a one-page document describing your business, market, services, and voice — multiplies the quality of everything. Live demo (20–25 min): Build a Business Brief live with a volunteer student, interview-style: who do you serve, what do you sell, what makes you different, how do you talk. Save it in a Claude Project. Then run the same prompt with and without the brief — the difference sells itself. Homework (the One Win assignment): Write your own Business Brief (use the class template), load it into a Claude Project, and use it in 5 prompts. Leader note: This week's asset gets used every single week afterward. Don't let anyone skip it.

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Field Notes 06

Week 3 — Prospecting I: Ideal Clients & Market Research Tool
focus: Claude + ChatGPT (web search) Goal: Students define exactly who they're hunting and build a repeatable research workflow for finding and understanding prospects. Teach (10–15 min): You can't automate prospecting until you can describe your prospect. The Ideal Client Profile (ICP). Using AI for market research: neighborhoods, niches, industries, life events that trigger buying. Researching a specific prospect or business before you ever reach out. Live demo (20–25 min): Build an ICP live for each industry. Then research a real local market: 'What's happening in the [city] housing market?' / 'What industries in [city] are hiring?' / 'Research [local business] — what would matter to the owner?' Show how 10 minutes of AI research turns a cold call warm. Homework (the One Win assignment): Write your ICP, then research 10 real prospects (people or businesses) with AI and save notes on each. Leader note: Plant the seed: business owners are one of the richest niches — every agent in this class can serve them. No pitch yet; just include business owners as one ICP example.

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Field Notes 07

Week 4 — Prospecting II: Outreach That Gets Replies Tool
focus: Claude + ChatGPT Goal: Every student builds a personal outreach library: cold email, warm email, social DM, text, and phone opener — in their voice, for their ICP. Teach (10–15 min): Why personalization beats volume. Anatomy of outreach that gets replies: relevance, brevity, one clear next step. How to use Week 3 research to personalize at scale without sounding like a robot. Compliance basics: AI drafts, YOU review and send. Live demo (20–25 min): Take 3 of the prospects researched in Week 3 homework and write real outreach live: an email, a DM, a follow-up text. Run them through 'make this shorter, warmer, less salesy.' Use ChatGPT voice mode to role-play the phone version. Homework (the One Win assignment): Send 10 pieces of AI-personalized outreach to real prospects. Track replies. Bring your numbers next week. Leader note: First week real revenue activity happens. Celebrate replies loudly in Week 5 wins segment.

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Week 5 — Follow-Up Machines Tool focus: Claude + first look at Cowork Goal: Students build a 30-day follow-up sequence and a personal objection-handling library. The fortune is in the follow-up — now it's systemized. Teach (10–15 min): 80% of sales take 5+ touches; most producers stop at 2. The follow-up ladder: value touch, check-in touch, story touch, direct ask. Building sequences once and reusing forever. Where automation is appropriate vs. where the human touch closes. Live demo (20–25 min): Build a 30-day, 8-touch follow-up sequence live for one industry. Then build an objection library: list the 10 objections you hear most, have AI draft three responses to each in your voice. Show Cowork generating the whole thing as a formatted document they can keep. Homework (the One Win assignment): Build your own 30-day sequence + objection library. Put 5 stalled prospects from your pipeline into the sequence this week. Leader note: Reactivating dead pipeline produces fast wins — expect at least one 'closed business I'd given up on' story by Week 7. Use it.

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Week 6 — Content & Social Media at Scale Tool focus: Claude + ChatGPT (images) Goal: Students learn to produce 30 days of social content from one hour of work, positioned to attract their ICP. Teach (10–15 min): Content is prospecting that works while you sleep. The pillar method: one idea becomes a post, an email, a video script, and three comments-bait questions. Authenticity rule: AI drafts, you add your stories. Hooks and platform basics for Facebook/LinkedIn/Instagram. Live demo (20–25 min): Generate a 30-day content calendar from one student's Business Brief. Write a week of posts live. Generate image concepts with ChatGPT. Show repurposing: yesterday's client question becomes today's post. Homework (the One Win assignment): Publish 5 AI-assisted posts this week. Bring engagement numbers and your best performer. Leader note: Optional guest speaker week — a team member already winning with social content.

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Week 7 — NotebookLM: Become the Expert Faster Tool focus: NotebookLM Goal: Students build a personal knowledge base from their industry documents and discover audio learning — turning drive time into study time. Teach (10–15 min): Why NotebookLM is different: it only answers from documents YOU give it — carrier guides, contracts, listing data, loan matrices, training recordings. Audio Overviews: turn any document into a podcast-style conversation you can interrupt with questions. Flashcards and quizzes for licensing exams and product knowledge. Live demo (20–25 min): Upload real documents live: a carrier underwriting guide / a purchase contract / loan program guidelines / this class's recordings. Generate an Audio Overview and play 60 seconds. Create a quiz from the document. Ask it a hard product question and show the cited answer. Homework (the One Win assignment): Build one notebook with at least 5 documents from your business. Listen to one Audio Overview during a commute or workout. Quiz yourself once. Leader note: Huge for new agents in licensing or onboarding. Also: the shared class notebook (all session recordings) becomes the program's searchable memory.

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Field Notes 11

Week 8 — Claude Cowork: Your AI Office Assistant Tool focus:

Claude Cowork Goal: Students see AI move from chatting to

DOING: real files, real documents, real automation —

including a scheduled morning briefing. Teach (10–15 min):

The difference between asking AI questions and giving AI jobs.

What Cowork can do: read and organize files, build Word docs

/ Excel sheets / slide decks, connect to email and calendar,

run scheduled tasks automatically. Live demo (20–25 min):

Three live jobs: (1) turn messy client notes into a clean one-

page proposal, (2) build a pipeline-tracking spreadsheet from

scratch, (3) set up a scheduled daily briefing — every morning

AI summarizes your calendar and flags priority emails before

you've had coffee. Homework (the One Win assignment):

Complete one real Cowork job in your business this week: a

document, a spreadsheet, or your own morning briefing.

Leader note: This is the 'aha' week for most students. Slow

down, show everything twice, record carefully.

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Field Notes 12

Week 9 — Manus & AI Agents: Delegate Whole Projects Tool
focus: Manus Goal: Students experience true delegation: hand an agent a whole project and get back finished work — a report, a deck, a simple web page. Teach (10–15 min): What an autonomous agent is: it plans the steps, browses the web, and delivers a finished product. When to use Manus vs. Claude/Cowork. The credit system and starting free. The delegation skill: writing a project brief instead of a prompt. Live demo (20–25 min): Delegate live: 'Build a 2026 market report for [city] real estate as a slide deck' / 'Create a simple landing page for my open house' / 'Research the top 20 employers in [county] and build a contact strategy spreadsheet.' Review results together; show how to request revisions. Homework (the One Win assignment): Delegate one complete project to Manus (or Cowork) for your business. Bring the finished product to class. Leader note: Manage expectations: agents are powerful but not perfect — the skill is the brief and the review, same as delegating to a new assistant.

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Week 10 — Client Experience: Meetings, Proposals, Reviews
Tool focus: All tools Goal: Students build a before-during-after meeting workflow: AI prep brief, clean proposal, same-day follow-up, and a client review system that drives referrals.
Teach (10–15 min): Speed and polish win deals. Pre-meeting: 10-minute AI prep brief on the person/property/business. Post-meeting: voice-note your recap, AI turns it into a follow-up email, proposal, and CRM notes. Annual reviews and referral asks, systemized. Live demo (20–25 min): Run a full cycle live: prep brief for a real upcoming meeting → mock 3-minute meeting → voice-note recap → AI produces follow-up email + one-page proposal + task list in under 10 minutes. Homework (the One Win assignment): Run the full workflow on at least 2 real meetings this week. Time yourself: prep + follow-up should be under 20 minutes combined. Leader note: Connect the dots: students now have prospecting (3–4), follow-up (5), content (6), learning (7), automation (8–9), and client experience (10). The machine is nearly complete.

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Week 11 — Your AI-Powered Week Tool focus: All tools Goal: Students audit their time, decide what to automate / delegate / keep human, and design their personal weekly operating rhythm. Teach (10–15 min): The producer's time audit: where the hours actually go. The 3-list framework: AUTOMATE (AI does it), ACCELERATE (AI drafts, you finish), HUMAN (only you). Designing the ideal week: prospecting blocks, follow-up blocks, AI-assisted admin hour, learning time. Live demo (20–25 min): Run a live time audit with a volunteer. Build their 3 lists. Then build their ideal weekly calendar and set up the supporting pieces: scheduled briefing (Wk 8), follow-up checks (Wk 5), content hour (Wk 6). Homework (the One Win assignment): Complete your own time audit and 3 lists. Build your ideal week calendar. Identify the 5+ hours you just got back — and decide what revenue activity fills them. Leader note: The hours-saved number each student produces here becomes their personal testimonial — collect them for recognition and promotion of the next cohort.

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Week 12 — Scale: New Income From What You Now Know
Tool focus: All tools + vision Goal: Graduation. Students lock in a 90-day growth plan — and discover that the skills they just built are exactly what local business owners desperately need, opening the door to the DBR B2B division and group sales income. Teach (10–15 min): Recap the system built over 12 weeks. Then the bigger opportunity: every student is now ahead of 95% of business owners on AI. Business owners need help with exactly what you've learned — and DBR's B2B model lets you build a division serving them, with group sales income that pays for life, not one transaction at a time. What a strategic partnership with DBR looks like. Live demo (20–25 min): Walk through one real story: a producer who added a B2B division. Show the math of group sales income vs. one-off commissions. Then each student drafts their 90-day plan live with AI: targets, weekly rhythm, one new income experiment. Homework (the One Win assignment): Finish your 90-day plan. Book a 1-on-1 strategy call with Mike if you want to explore the B2B division. Invite one colleague to the next cohort. Leader note: This is the harvest week — but keep it invitation, not pitch. The 11 weeks of pure value have earned the right to show the door; let them walk through it. Recognition ceremony: certificates, top-win awards, shout-outs.

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Field Notes 16

Running the Program Well Recognition & Retention • Open every class with wins. Name names. Screenshot results and celebrate them in the group chat between classes. • Weekly awards: 'Win of the Week,' 'Most Improved Prompt,' 'Automation of the Week.' • Certificates at graduation; recognize perfect attendance.

Between Classes • A group chat or community space for questions and win-sharing keeps momentum between sessions. • Load every recording into the shared class NotebookLM notebook — students can ask the class itself questions, and it demos Week 7 all program long. • Send one mid-week tip email: a single prompt to try, written for each industry.

Measuring Success • Attendance and homework completion rate week over week. • Student-reported numbers: outreach sent (Wk 4), pipeline reactivated (Wk 5), posts published (Wk 6), hours saved (Wk 11). • Back-end: strategy calls booked from Week 12 and new B2B division partners started.

Next Cohorts • Graduates become guest speakers and testimonials for the next run — the program markets itself. • Advanced track idea for graduates: monthly 'AI Mastermind' for new tools, new wins, and deeper automation.

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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