

DBR AI LEVERAGE LAB · PROMPT WORKBOOK

Top 10 Cowork Automation Prompts

Copy-and-paste workflows for a safer, more consistent AI-assisted sales week.

Built for the conversations and decisions that matter most.

Use ten review-first Cowork prompts to recover follow-ups, personalize outreach, prepare meetings, and keep your pipeline moving.

01

Read for the signal

Use the original field guidance to identify the few ideas that should change how you work this week.

02

Study the examples

Mark the source language, prompts, checklists, or frameworks that fit your role and audience.

03

Apply with judgment

Keep human oversight in every client-facing decision and verify the facts relevant to your situation.

14

Magazine pages

Designed for screen reading, printing, discussion, and practical field use inside the DBR Library.

Automation should make your judgment more visible—not less.

Drafts, never blind sends

Cowork creates drafts. You review the language, facts, recipients, and timing before anything leaves your hands.

Protect sensitive information

Do not paste SSNs, account numbers, policy numbers, health details, or other sensitive client data into an AI tool.

Verify current facts

Confirm plan details, tax rules, carrier specifics, and every other current claim before you use it in conversation.

Keep consent in view

For texting or calling from a list, confirm that proper written consent is in place before you act.

Make it recognizably yours

Personalize every draft with the real context and human judgment only you can bring to the relationship.

Start with one workflow

Set up one useful job, learn from it, and build your system deliberately rather than automating everything at once.

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.

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.

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

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.

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.

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. AI Leverage Lab · Cowork Automation Prompts RUN YOUR DAY ON RAILS

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.

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.

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.

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.

The advantage appears when the lesson becomes a habit.

Pick one prompt, paste your Business Brief first, review every draft, and turn it into a repeatable weekly habit.

ONE DECISION · ONE ACTION · ONE BETTER WEEK