



THE FREE RESOURCE FROM THE EXPERT SESSION

Create your first AI team member

Everything from the session in one place, plus the part we could only point at live: building an actual assistant that writes your morning briefing, watches your inbox and more, in Claude or ChatGPT, this week.

Hello, whether you were in the room or you're here from the replay. This walks the same path we walked together, at your pace, with everything copyable. Work through it in order the first time: the card, then the rules, then the job. An hour, start to finish, and most of that is you writing plain sentences about a business you know better than anyone.

STEP ONE

The Carry Everywhere Context Card

One document about your business that travels with you into every AI conversation, so it knows who you are from the first line and every draft starts from the truth: your offers, your prices, your voice.

Copy the template below into any document, answer the eight questions in plain sentences, and keep it somewhere you can copy in three seconds. Plain sentences beat clever ones; the AI needs facts and voice, not marketing copy.

THE CONTEXT CARD TEMPLATE

MY CONTEXT CARD

What my business does, in my own words:

[Two or three sentences.]

What I'm an authority in, and how I position myself:

[The thing people come to you for, and how you talk about it.]

My ideal buyer, and what they're struggling with or looking for when they find me:

[Their situation, in the words they'd use.]

Who is absolutely not my ideal buyer:

[This stops the AI writing for the wrong person.]

What I sell, the results and transformation it brings, and rough prices:

[Every offer, its outcome, its price. This is what stops the AI inventing them.]

How I sound:

[Describe how you talk to clients: warm, direct, playful, calm.

Then paste in four to six pieces of your best content that sounds most like you.]

What I'd never say:

[Words, phrases and tones that aren't you.]

My three priorities this quarter:

[Three lines. This is what lets the AI help you decide, not just write.]

STEP TWO

Your voice rules and your AI rules

This is the part almost nobody does, and it's the difference between drafts that sound like you and drafts that sound like AI's idea of a business owner. Add both blocks to the bottom of your card.

Your voice rules

Words you always use and words you'd never touch. How your sentences run: long and rolling, or short and direct. Then three real lines you've written, from an email, a post, a text to a client, pasted in as examples, because nothing teaches your voice faster than your voice.

Your AI rules

What it must never do, and what to do when it's unsure. Rules are the difference between a clever tool and a careful one, and the last rule below changes everything on its own.

ADD TO THE BOTTOM OF YOUR CARD

MY VOICE RULES

Words and phrases I always use:

[Your actual vocabulary.]

Words and phrases I'd never touch:

[The ones that make you wince.]

How my sentences run:

[Long and flowing, or short and direct. Formal or like a text to a friend.]

Three real lines I've written that sound exactly like me:

1. [Paste from a real email, post or message.]
2. [Another.]
3. [One more.]

MY AI RULES

- Never invent prices, offers, dates or facts about my business.
If it isn't in this card, you don't know it.
- Never promise results to a client on my behalf.
- No emojis unless I've used them first.
- Don't flatter me. Tell me straight.
- Match my spelling: [British / American] English.
- When you're unsure about anything, ask me instead of guessing.

Prove it to yourself before going further. Ask your AI to write a reply to a client asking about working with you, in a brand-new conversation with nothing else pasted in. Then ask again with your card on top. Read both out loud. That difference is what you just built, and it shows up in every conversation from now on.

STEP THREE

The FAQ Sheet

You answer the same questions all week: email, DMs, the counter, the team. The FAQ Sheet gets each answer written well once, so the fiftieth time costs you nothing.

1. **Gather the questions.** Copy a batch of your sent replies from email, Slack or DMs, paste them in with the prompt below, and let the AI find the repeats. If your AI is connected to your email, ask it to sweep your sent folder instead.
2. **Keep the sheet somewhere real.** Google Sheets or Notion both work; mine lives in Notion. Two columns: the question, your best answer. Update it whenever a new repeat appears.
3. **Use it.** When a question comes in, paste your card, the sheet and the enquiry, and ask for a reply in your voice pulling the correct answer.
4. **Take it further when ready.** Share the sheet in a Slack channel and the team stops asking you. Further still, it becomes a bot that answers for you, which is a story for another day but entirely real.

THE FAQ SWEEP PROMPT

Below are replies I've sent to clients and my team. Read them and:

1. List every question I've answered more than once, in the words people actually asked it.
2. For each, pull my best answer, keeping my wording where it's good.
3. Give me the lot as a two-column table (Question / My answer)
I can paste into Notion or Google Sheets.

[Paste your sent replies here.]

THE REPLY-DRAFTING PROMPT

Here's my Context Card, my FAQ sheet, and a message that's just come in. Draft a reply in my voice, following my rules, using the correct answer from the sheet. If the answer isn't in the sheet, ask me rather than inventing one.

[Card, sheet, then the message.]

STEP FOUR

Thought into Things

A voice note in the car. A line typed into your phone between clients. The thinking's already done; what's been missing is the hour to shape it, and that hour is what this hands back.

Record the voice note, get the transcript (your phone does this, or paste the audio straight into the app), then use the prompt below. Works for posts, emails, newsletters, page copy, anything made of your thinking.

THE THOUGHT INTO THINGS PROMPT

Here's my Context Card, then a rough voice note transcript.
Turn it into [a post / an email / a newsletter] in my voice,
following my voice rules and AI rules. Keep my ideas and my
phrasing where it's strong; tidy the rambling; don't add ideas
I didn't say. Give me one version, ready for a final read.

[Card, then transcript.]

STEP FIVE

Create your first AI team member: The Assistant

Everything so far still relies on you pasting the card in every time, and documents go stale the moment your prices change. So now you hire. Your first team member is an assistant with four real jobs: it writes your morning briefing, keeps an eye on your inbox and drafts the replies, runs your Monday sort, and answers repeat questions from your FAQ Sheet. Your card and your rules are its induction; the job description below is its contract.

In Claude

1. Go to claude.ai, open **Projects** and create a new project. Give your assistant a name; mine have names, and it changes how you work with them.
2. Open the project's **instructions** (the “set custom instructions” option) and paste in your full Context Card, both rule blocks, and the job description below.
3. Add your FAQ Sheet to the project's knowledge.
4. If you connect your email and calendar (Settings, then Connectors), the morning briefing and inbox watch run on your real inbox and your real day. Without them it still works: paste the morning's emails in and ask for the briefing.
5. Every conversation inside that project now starts already knowing your business, your voice and its jobs. Open it, type “morning briefing”, and watch.

In ChatGPT

1. Open **Projects** in the sidebar and create one, named for your assistant.
2. Paste your card, rules and the job description into the project's instructions, and add your FAQ Sheet as a project file.
3. Connect Gmail and your calendar in Settings if you want the briefing and inbox watch running on the real things; paste them in if not.

THE ASSISTANT'S JOB DESCRIPTION

YOUR JOB

You're my assistant. You have four jobs.

1. THE MORNING BRIEFING

When I say "morning briefing", give me: today's calendar and what each thing needs from me, anything in my inbox that actually matters, what's due or overdue against my three priorities, and the one thing I should do first. One page, no waffle.

2. THE INBOX WATCH

When I share my inbox (connected or pasted), sort it into: needs me today, can wait, doesn't need me at all. Draft replies for the first pile in my voice, using my FAQ Sheet for repeat questions.

3. THE MONDAY SORT

When I give you my messy list for the week, order it against my three priorities, tell me the first domino, and flag anything that maybe shouldn't exist at all.

4. THE FAQ DESK

When a question comes in that's on my FAQ Sheet, draft the reply from the sheet, in my voice. If the answer isn't on the sheet, ask me, then suggest I add it.

How you work, always:

- My Context Card is the truth about my business. If something isn't in it, ask me.
- Write in my voice, following my voice rules and AI rules above.
- Every draft ends ready for me to read and send. You draft; I approve. You never send anything.

Start with the morning briefing tomorrow; it's the job that makes the others stick, because it puts your assistant at the start of your day rather than the bottom of your list. Both Claude and ChatGPT can also run it on a schedule (scheduled tasks in Claude, tasks in ChatGPT), so it's waiting for you with your coffee.

Update the card inside your assistant whenever prices or priorities change; two minutes on the first of the month covers it. A stale card is the only way this stops working. And when your assistant has earned its keep, which takes about a week, build the second team member with a job of its own.

KEEP GOING

Ten more hours hiding in plain sight

Each of these works in a plain conversation, and every one works better with your card on top.

1. **Consultation and meeting notes** summarised into actions: paste the notes, ask for decisions, actions and owners.
2. **Proposals and quotes** drafted from your last three: paste them in, describe the new client, ask for a draft in the same shape.
3. **Testimonials mined** for the lines that sell: paste the lot, ask for the strongest lines grouped by the doubt they answer.
4. **Aftercare and prep instructions** personalised in seconds from your standard version.
5. **Social captions** from a photo and two lines about what's happening in it.
6. **Your month's numbers** explained in plain English: paste the report, ask what changed and what to watch.
7. **Job ads and how-to guides** for the team, drafted from you describing the role out loud.
8. **Newsletters assembled** from what you already posted this month.

9. **Research compared in a table:** suppliers, venues, competitors, with your criteria as the columns.

10. **The Monday sort:** the prompt below, first thing each week.

THE MONDAY SORT PROMPT

Here's my Context Card and my messy list for the week. Order the list against my three priorities, tell me the first domino (the one task that makes the others easier), and flag anything on the list that maybe shouldn't exist at all. Be straight with me.

[Card, then your list.]

That's the whole path: a card, some rules, an assistant with real jobs. You'll feel the first hours come back this week, and the morning your briefing is waiting for you with your coffee, you'll understand why I built a whole business on this idea.

Questions, or want to show me what you built? I'd genuinely love to see it: gemma@lighthouse.online, or message us on [WhatsApp](#).

Prefer it as a document? [Download the PDF version](#) and work through it anywhere.



Gemma Went · lighthouse.online