

AI CLARITY AUDIT™

PROMPTS + SETUP

LL Business Collective



Prepared by ISW Consulting

INSIDE THIS GUIDE

Part 1: Start here	How to use this guide, how the tools connect, the LL-BC System Prompt, and the prompt library index
Part 2: Tool setup	Plain-language setup steps for HubSpot, Google Workspace, the AI workspace, Canva, and Zapier
Part 3: Workflows	Five workflows with flow diagrams, step-by-step setup, ready-to-use prompts, and test checklists
Part 4: Go live	Activation and ongoing control checklist

PART 1

Start Here

Read this part first. It explains how the pieces fit before you set anything up.

HOW TO USE THIS GUIDE

Prompt Sequencing Rules

Each prompt sits right beside the setup step where it belongs. Don't copy a prompt without also following the when, where, and human check notes shown with it.

HOW EACH PROMPT FITS THE WORK

- 1 Work comes in**
An email, a meeting, a file, or a draft



- 2 Rules run first**
HubSpot links, Gmail labels, templates



- 3 AI does one job**
The step prompt for that step



- 4 A person checks**
Approve, fix, or reject

HUMAN CHECK



- 5 HubSpot records it**
Task, meeting, or project



- 6 We measure it**
Counts, not time logs

The prompt is one step in the process, not the whole process.

1. Set up the AI workspace once

Paste the LL-BC System Prompt into the workspace or project instructions. Don't paste it as a chat message each time.

2. One prompt, one job

Each step prompt does a single task. Don't combine drafting, checking, and sending in one prompt.

3. Fill in every [BRACKET]

Bracketed items come from HubSpot, Drive, or the client guide. If something is missing, stop and find it. Don't let AI guess.

4. Keep the human check where it's shown

The reviewer checks facts, not just wording. Nothing goes to a client or the public without a person's OK.

5. Save prompts that work

Keep the approved prompts in the LL-BC AI Playbook folder with a version date. Improve them there, not in personal notes.

THE BIG PICTURE

How Your Tools Connect

Work flows from top to bottom. Read it like a recipe: something comes in, AI drafts, a person checks, HubSpot records, and the result lands where it belongs.

1. WORK COMES IN

Gmail

Client emails

Google Calendar

Leanne's time

Meet and Zoom

Client calls

Client files

Briefs, photos, notes



2. AI HELPERS DO THE FIRST DRAFT

Gemini in Gmail

Replies and scheduling

HubSpot Notetaker

Notes and action items

AI workspace

Guides, content, checks

Zapier

Moves requests, files every attachment



3. A PERSON CHECKS

Leanne

Anything in her name

Stephanie

Tasks, content, files

Meeting lead

Action items

Client

Final approval



4. HUBSPOT KEEPS THE RECORD

Clients

Company records

Projects

Client Delivery pipeline

Tasks

Owner and due date

Meetings

Links and notes

File links

Guide and Drive folder



5. RESULTS LAND WHERE THEY BELONG

Google Drive

Every client file, named and filed

Canva

On-brand designs

Client inbox

Approved emails and proposals

Gemini in Drive

Finds any file by asking

The simple version

HubSpot is the front office. Every job checks in there. The AI helpers are assistants who take notes and write first drafts. A person always signs off before anything leaves LL-BC.

Staying exactly as is

QuickBooks and its HubSpot sync, Hyfin, Susser Bank, DashThis client reports, and Adobe Acrobat. They already work. Calendly retires because HubSpot meeting links replace it.



PASTE ONCE

LL-BC System Prompt

Paste this into the instructions of the LL-BC Operations project and at the top of every client project's instructions. The step prompts that follow assume it is already active.

SYSTEM PROMPT USED ACROSS ALL WORKFLOWS

COPY AND PASTE AS IS

You are the LL Business Collective AI Assistant. LL Business Collective (LL-BC) is a marketing and business services firm led by owner Leanne Libby. LL-BC delivers custom marketing, social media management, content creation, email marketing, collateral design, sales support, lead lists, and HubSpot setup for a small group of clients. The team is made up of full-time and part-time contractors, and Stephanie Spino is the Team Lead.

YOUR JOB

Help the team prepare, draft, check, summarize, and organize work. People make the decisions, approve client-facing work, and send every message.

OPERATING RULES

1. Use only the information in this conversation, the attached files, the client reference guide, and connected HubSpot or Google Drive records.
2. Never invent a name, date, event, price, statistic, quote, contact detail, or result. If something is missing, say what is missing and ask for it.
3. Keep each client separate. Never mix one client's details, voice, or files into another client's work.
4. Check every date against its day of the week and flag any date that does not match.
5. Use event and program names exactly as written in the client reference guide, including names that change from year to year.
6. Separate facts from suggestions. Label anything you are unsure of as "Needs review."
7. Write in plain, natural language. No jargon, no hype, and no em dashes.
8. Do not send emails, post content, or change HubSpot records unless a person has reviewed and approved that specific action.
9. Do not make legal, tax, or compliance decisions. Flag possible issues and note that the client or a qualified professional decides.
10. Keep confidential client information inside LL-BC's approved tools.

HUMAN REVIEW IS REQUIRED WHEN

- The output goes to a client, a prospect, or the public.
- A date, name, price, event, or contact detail cannot be confirmed from a source.
- Two sources disagree.
- The work involves email list rules, political or fundraising messages, or legal language.
- Your confidence is Medium or Low.

STANDARD RESPONSE FORMAT (use unless a step prompt asks for a different format)

- A. Result
- B. Sources used
- C. Missing or conflicting information
- D. Confidence: High, Medium, or Low, with one sentence on why
- E. Suggested next step
- F. Human review needed: Yes or No

BEFORE ANY WORKFLOW

Shared Setup

Company accounts only	Every contractor works in an LL-BC Google account and LL-BC seats in HubSpot, Canva, and the AI workspace. No personal or free AI accounts for client work.
Named owners	Leanne is the business owner and has the final say. Stephanie owns the workflows and HubSpot admin. Each workflow below names its reviewer.
One home for work	Clients, projects, tasks, meetings, and leads live in HubSpot. Files live in the client's Google Drive folder.
Client folder standard	Every client folder in Drive uses the same subfolders: 01 Agreement and Scope, 02 Reference Guide, 03 Working Files, 04 Finals, 05 Reports, 06 From Client. Workflow 5 files attachments into them automatically.
Prompt library	Approved prompts live in the Drive folder "LL-BC AI Playbook" with a version date. Improve prompts there, not in personal notes.
Team roster	Keep a one-page roster in the Playbook: each person, the clients they serve, and the work they own. Several prompts use it.
Human sign-off	Anything going to a client, a prospect, or the public gets a person's OK first.
Measurement	Use counts HubSpot and Gmail already collect, plus short spot checks. No time logs.

Simple rule

AI drafts. People decide. HubSpot keeps the record.

Prompt Library Index

Every prompt in this guide, where it lives, and when to use it. The number tells you which workflow it belongs to.

#	Prompt	Use it when	Where to run it
1A	Leanne's email voice guide	Once, to teach AI how Leanne writes	AI workspace: LL-BC Operations
1B	Inbox sweep	Morning and mid-afternoon	Gemini panel in Gmail
1C	Scheduling reply	A meeting request comes in	AI workspace: LL-BC Operations
1D	Routine reply in Leanne's voice	A quick reply is needed	AI workspace: LL-BC Operations
2A	LL-BC meeting summary	Every client meeting	HubSpot Notetaker template
2B	Email to task	A client emails a request	Zapier AI step
2C	Monday task cleanup	Every Monday	AI workspace + HubSpot
3A	Interview prep	Before Leanne's client interview	Client project
3B	Client reference guide builder	Creating each client guide	Client project
3C	Meeting prep brief	The day before a client meeting	Client project
3D	Guide update check	Once a month	Client project
4A	Client content instructions builder	Setting up each client project	Client project
4B	Monthly content calendar	Monthly content planning	Client project
4C	Human voice pass	Before captions go to design	Client project
4D	Proof and fact check	Before anything goes to a client	Client project
5A	File sort	Every client attachment (runs inside Zap 2)	Zapier AI step
5B	Weekly folder check	Every Friday	Ask Gemini in Drive
5C	Find a file	Anyone needs a current file	Ask Gemini in Drive

PART 2

Tool Setup

Set up the tools in this order. Each page shows a simple ladder on the left and the plain-language steps on the right.

TOOL SETUP 1 OF 5

HubSpot Sales Hub Professional

WHAT IT'S FOR

Home base for clients, projects, tasks, meetings, and leads. Most of LL-BC's new setup happens here, and LL-BC already pays for it.

WHO SETS IT UP

Stephanie (HubSpot admin), with Leanne approving the pipeline and meeting links.

CONNECTS TO

[Gmail and Google Calendar](#)
[Google Meet and Zoom](#)
[QuickBooks \(existing sync\)](#)
[AI workspace connector](#)
[Zapier](#)

SETUP LADDER

1 Check seats

Who has Pro



2 Build the project pipeline

Client Delivery



3 Set the task standard

Owner, date, client



4 Add repeat checklists

Brochures, batches, lists



5 Create meeting links

Ends the ping-pong



6 Turn on Notetaker

Notes become tasks



7 Add link properties

Guide and Drive folder

Ready: every job, task, and meeting lives in HubSpot.

- 1 **Check seats.** In Settings, open Users and Teams. Note who has a Sales Hub Professional seat. Meeting Notetaker and sequences only work for people with one. Also confirm which of LL-BC's two HubSpot accounts is the Professional one, and do all of this work there.
- 2 **Build the project pipeline.** Search "Projects" in HubSpot. Create a pipeline called Client Delivery with five stages: Planned, In Progress, Client Review, Wrap-up, Done. Turn on the pipeline rule that blocks skipping stages. Create one project per client engagement or campaign and link it to the client's company record.
- 3 **Set the task standard.** Every task gets a client company, a project, one owner, a due date, and a priority. High means due this week. Use subtasks for multi-step jobs like a brochure from first proof to print. Save two views for everyone: "My tasks this week" and "Overdue by client."
- 4 **Add repeat checklists.** For repeat work (brochure, monthly social batch, email campaign, lead list), use pipeline automation so moving a project into a stage adds that stage's standard tasks. Keep each checklist short.
- 5 **Create meeting links.** Search "Meetings" and open the Meetings Scheduler. Create three links: Intro Call (30 min), Client Working Session (60 min), and Team Check-in (15 min). Set buffers, minimum notice, and Leanne's focus blocks so nobody can book over them.
- 6 **Turn on Meeting Notetaker.** Search "Notetaker" in Settings. Connect Google Meet and Zoom, set it to join client meetings, and load the LL-BC summary template (Prompt 2A). Add the consent line from Workflow 2 to every client meeting link and invite.
- 7 **Add two link properties.** In Settings, open Properties, choose Company, and create two properties that hold a link: Reference Guide and Drive Folder. Each client's guide and Drive folder links go here, so both are one click from the client record.

TOOL SETUP 2 OF 5

Google Workspace with Gemini

WHAT IT'S FOR

Gemini in Gmail drafts replies, summarizes long threads, and suggests meeting times from Leanne's calendar. Drive holds every client file, and Ask Gemini in Drive finds the latest version. No new app to learn.

WHO SETS IT UP

Leanne (or whoever manages the Google Admin console).

CONNECTS TO

Gmail Google Calendar Google Meet Google Drive HubSpot meeting links

SETUP LADDER

1 Check the edition
Standard or higher



2 Turn Gemini on
Admin console



3 Set calendar rules
Hours and focus blocks



4 Add Gmail labels
Sort the inbox



5 Build the daily habit
Two sweeps a day



6 Check results
Fyxr only if needed

Ready: Leanne's inbox and calendar work for her.

- 1 Check the edition.** In the Google Admin console, open Billing and confirm the plan. Help me schedule and Gemini in Meet, Docs, and Sheets need Business Standard or higher. Upgrade only the people who need those features.
- 2 Turn Gemini on.** In the Admin console, open the Generative AI settings and make sure Gemini is on for the LL-BC team.
- 3 Set calendar rules.** In Google Calendar, set Leanne's working hours and add recurring focus blocks named "Focus: do not book." Help me schedule and HubSpot meeting links both respect these.
- 4 Add Gmail labels.** Create three labels: To HubSpot, Scheduling, and Waiting on Client. The To HubSpot label triggers Zap 1. Client attachments are filed by Zap 2 with no label needed.
- 5 Build the daily habit.** Each morning and mid-afternoon, Leanne opens the Gemini panel in Gmail and runs Prompt 1B. For scheduling replies she uses Help me schedule or Prompt 1C.
- 6 Check results after a month.** Compare Leanne's inbox spot check with the baseline. If Gemini isn't cutting her inbox time enough, trial Fyxr AI on Leanne's inbox only before adding it for anyone else.



TOOL SETUP 3 OF 5

AI workspace: ChatGPT Business or Claude Team

WHAT IT'S FOR

One shared, private place for LL-BC's AI work, with a separate project for each client so voices and files never mix. Pick one platform, not both.

WHO SETS IT UP

Stephanie sets it up. Leanne approves who gets a seat.

CONNECTS TO

HubSpot connector

Google Drive connector

Gmail (optional)

Client reference guides

SETUP LADDER

1 Pick one platform

Not both



2 Add seats

Start with 3



3 Connect HubSpot and Drive

Read access



4 Build LL-BC Operations

System prompt



5 Build client projects

One per client

Ready: every client has its own AI project.

- 1 Pick one platform.** ChatGPT Business and Claude Team cost the same and both connect to HubSpot and Google Drive. Run a short trial of each using LL-BC's own sample content, never client files, and keep the one whose drafts need fewer edits.
- 2 Add seats.** Start with three seats: Leanne, Stephanie, and the person who writes the most client content. Invite people with their LL-BC email addresses only.
- 3 Connect HubSpot and Google Drive.** An admin turns on the HubSpot and Google Drive connectors in the workspace settings. Each person then signs in once to authorize them. The connectors respect each person's HubSpot permissions.
- 4 Build the LL-BC Operations project.** Create a project named LL-BC Operations. Paste the LL-BC System Prompt into the project instructions (ChatGPT: project settings; Claude: Set project instructions). Add the team roster and Leanne's voice guide as project files.
- 5 Build one project per client.** Name each one "Client: " plus the client's name. Paste the client's instructions (built with Prompt 4A) into the project instructions, then add the client reference guide, brand notes, and best past posts as files. Share the project only with the people who work that client.

TOOL SETUP 4 OF 5

Canva Business

WHAT IT'S FOR

A brand kit and locked templates for every client, plus Bulk Create to turn a month of captions into designs in one pass. Canva Pro stops at five brand kits, and LL-BC needs one per client plus its own.

WHO SETS IT UP

LL-BC's template designer, with Stephanie approving.

CONNECTS TO

AI workspace (caption table)

Google Sheets or CSV

Client photo libraries

Existing social scheduler

SETUP LADDER

1 Upgrade designers

Canva Business



2 Build brand kits

One per client



3 Design locked templates

6-10 per client



4 Name the text fields

Match the table



5 Run Bulk Create

A month at once

Ready: a month of on-brand designs
from one table.

- 1 **Upgrade the designers.** Move the people who build and fill templates to Canva Business. Reviewers can stay on view or comment access.
- 2 **Build a brand kit per client.** Add each client's logos, colors, fonts, and approved photos. Name the kit with the client's exact business name.
- 3 **Design locked templates.** A person designs 6-10 templates per social client: event promo, quote, tip, photo spotlight, announcement, and so on. Lock logo position, colors, and layout so filling them can't break the design. Use the client's real photos as the default, not AI-generated images.
- 4 **Name the text fields.** Give every template the same text boxes: headline, subhead, body, cta, and date_line. These match the columns Prompt 4B produces.
- 5 **Run Bulk Create.** Open the template, choose Bulk create from Apps, upload the CSV from Prompt 4B, connect each column to its text box, and generate. Stephanie reviews the designs, swaps any photos, and sends them on to the proof check.

TOOL SETUP 5 OF 5

Zapier Professional

WHAT IT'S FOR

Moves work between apps so nobody retypes it: labeled emails become HubSpot draft tasks, and every client attachment lands in the right Drive folder with a standard name.

WHO SETS IT UP

Stephanie, with ISW Consulting available for the first build.

CONNECTS TO

Gmail

HubSpot tasks and notes

Google Drive client folders

Client Lookup sheet

AI by Zapier step

SETUP LADDER

- 1 Create the account**
LL-BC admin email



- 2 Connect the apps**
Gmail, HubSpot, Drive



- 3 Build Email to Task**
Zap 1



- 4 Build Client Files to Drive**
Zap 2



- 5 Turn on alerts**
Errors go to Stephanie

Ready: requests and files move on their own.

- 1 Create the account.** Sign up for Zapier Professional with an LL-BC admin email, not a personal one, so the automations stay with the company.
- 2 Connect the apps.** Connect Gmail (the inboxes that receive client requests), HubSpot, and Google Drive.
- 3 Build Zap 1: Email to Task.** Trigger: a new email gets the To HubSpot label. Step 2: an AI by Zapier step runs Prompt 2B on the email. Step 3: create a HubSpot task titled "DRAFT:" plus the task title, linked to the client company, assigned to the reviewer's queue, with the email link in the notes. Step 4: swap the label to In HubSpot.
- 4 Build Zap 2: Client Files to Drive.** Trigger: a new email in Gmail that matches the search has:attachment plus the client domains and addresses in the Client Lookup sheet (sent or received). Step 2: skip signature images and calendar invites. Step 3: look up the client in the Client Lookup sheet. Step 4: an AI by Zapier step runs Prompt 5A. Step 5: if confidence is High, upload the file with its new name to the client's folder and add a note with the link to the HubSpot company record. If not, upload it to the _To Sort folder and create a HubSpot task for Stephanie.
- 5 Turn on alerts.** Send Zap error emails to Stephanie, and write down in the Playbook how to pause each Zap.

PART 3

Workflows and Prompts

Five workflows, in roadmap order. Each one opens with a one-page overview and flow diagram, then walks through setup and prompts step by step.

WORKFLOW 1 OF 5

Owner Calendar and Inbox Assistant

GOAL

Take scheduling and routine email off Leanne's plate without anything going out in her name unreviewed.

PLANNING ESTIMATE

9–21 hours per month

OWNERS

Business owner: Leanne | Workflow owner: Stephanie | Delegates: Sarah and Michelle for scheduling

TOOLS

Gmail with Gemini, Google Calendar, HubSpot meeting links, AI workspace

INPUTS

Leanne's working hours and focus blocks, HubSpot meeting links, the scheduling rule set, 10–15 of Leanne's sent emails

OWNER CALENDAR AND INBOX ASSISTANT

1

Email arrives

A scheduling request or a question



2

Gemini sorts and summarizes

What they want and by when



3

AI drafts the reply

With the right meeting link or open times



4

Leanne checks

Edit, send, or hand off

HUMAN CHECK

5

Booking lands

Calendar and HubSpot record update

Nothing sends in Leanne's name without her OK.

STEP 1 | Write the scheduling rules

WHEN: Once, before anything else. | **WHERE:** A Google Doc in the LL-BC AI Playbook folder. | **HUMAN CHECK:** Leanne approves the rules.

SETUP AND ACTION: Write one page: which HubSpot meeting link to use for what, Leanne's focus blocks, who can book her directly, minimum notice, and what to do when no time works (offer the link again, never more than two emails). Share it with Sarah and Michelle so scheduling stops bouncing back to Leanne.

No AI prompt at this step

One written rule set everyone follows. Move to Step 2.



STEP 2 | Capture Leanne's email voice

WHEN: Once, then refresh every six months. | **WHERE:** AI workspace, LL-BC Operations project. | **HUMAN CHECK:** Leanne reads and corrects the voice guide.

SETUP AND ACTION: Copy 10-15 recent emails Leanne wrote: client replies, scheduling notes, follow-ups, and a polite no. Remove anything confidential that isn't needed.

PROMPT 1A: LEANNE'S EMAIL VOICE GUIDE

COPY AND PASTE

Use the LL-BC System Prompt.

TASK

Study the emails below, all written by Leanne Libby, owner of LL Business Collective. Write a one-page voice guide another writer could follow to sound like her.

EMAILS

[PASTE 10-15 OF LEANNE'S SENT EMAILS]

INCLUDE

- How she opens and closes emails
- Typical length and sentence style
- Words and phrases she uses often
- Words and phrases she never uses
- How she handles scheduling, saying no, and following up
- Three short example replies written in her voice

RULES

- Base every point on the emails provided. Do not guess.
- Keep it to one page.

Expected output and next handoff

"Leanne's Email Voice" saved to the Playbook folder and added to the LL-BC Operations project.

STEP 3 | Run the daily inbox sweep

WHEN: Morning and mid-afternoon. | **WHERE:** Gemini panel in Gmail. | **HUMAN CHECK:** Leanne decides what she answers, hands off, or skips.

SETUP AND ACTION: Open Gmail, click the Gemini icon at the top right, and paste Prompt 1B. Hand off items with one line of direction.

PROMPT 1B: INBOX SWEEP

COPY AND PASTE

Look at my unread emails from [THE LAST 24 HOURS / SINCE 1 PM].

Sort them into four groups:

1. Needs my reply today
2. Scheduling requests
3. Can go to Stephanie, Sarah, or Michelle (say who and why)
4. FYI only, no reply needed

For each email give the sender, the client or company, a one-line summary, and any date or deadline mentioned. Do not draft replies yet.

Expected output and next handoff

A short, sorted list Leanne can clear in minutes.

STEP 4 | Draft the scheduling reply

WHEN: A meeting request arrives. | **WHERE:** Gmail Help me schedule, or the LL-BC Operations project for Prompt 1C. | **HUMAN CHECK:** Leanne or the delegate reviews before sending.

SETUP AND ACTION: For one-on-one meetings, click Help me schedule in the Gmail reply toolbar to drop in open times from the calendar. For group meetings or anything Help me schedule can't handle, run Prompt 1C in the LL-BC Operations project, which holds Leanne's voice guide.

PROMPT 1C: SCHEDULING REPLY

COPY AND PASTE

Write a short reply to this email in Leanne's voice using her voice guide.

GOAL: Get the meeting booked in one reply.

MEETING TYPE: [INTRO CALL / CLIENT WORKING SESSION / TEAM CHECK-IN]

BOOKING LINK: [HUBSPOT MEETING LINK]

RULES

- Under 80 words.
- Offer the booking link first.
- If they asked for specific times, say whether one works based on these open times: [OPEN TIMES FROM CALENDAR]
- Do not promise anything beyond the meeting.
- No em dashes.

Expected output and next handoff

A reply ready to send. The booking flows to the calendar and the HubSpot record.

STEP 5 | Draft routine replies

WHEN: An email needs a reply but not Leanne's deep thinking. | **WHERE:** AI workspace, LL-BC Operations project. | **HUMAN CHECK:** Leanne edits and sends.

SETUP AND ACTION: Tell the AI what you want to say in a line or two. It writes the rest in Leanne's voice.

PROMPT 1D: ROUTINE REPLY IN LEANNE'S VOICE

COPY AND PASTE

Draft a reply to the email below in Leanne's voice using her voice guide.

EMAIL

[PASTE EMAIL THREAD]

WHAT I WANT TO SAY

[ONE OR TWO LINES: YES / NO / NEED MORE INFO / HANDING TO A TEAM MEMBER]

RULES

- Keep it shorter than the email I'm replying to.
- If the email asks for something I didn't address, list it under "Still open" below the draft.
- Do not commit to dates, prices, or deliverables I didn't state.

Expected output and next handoff

A draft Leanne can edit in under a minute.

TEST AND ACTIVATE

Test cases

- New client asking for an intro call
- Client asking for a specific time
- Group meeting with three or more people
- Request with less than a day's notice
- Team member trying to book Leanne
- Reply that needs a polite no
- Long thread with a buried deadline

Ready to go live when

- Leanne approved the scheduling rules
- Leanne approved her voice guide
- 10 drafts sent with light or no edits
- Calendly retired
- Scheduling threads down by half

WORKFLOW 2 OF 5

Meeting and Email Task Capture

GOAL

Every client request becomes a HubSpot task with an owner and a due date, the same day.

PLANNING ESTIMATE

8-16 hours per month

OWNERS

Business owner: Leanne | Workflow owner and HubSpot admin: Stephanie | Reviewer: the meeting lead

TOOLS

HubSpot Meeting Notetaker, HubSpot projects and tasks, Gmail labels, Zapier, AI workspace

INPUTS

Meeting recording or notes, the client's company record and active project, the team roster

MEETING AND EMAIL TASK CAPTURE

1 Meeting or email
Client call on Meet or Zoom, or a request by email



2 AI takes notes
Summary, decisions, action items



3 Draft tasks
Client, owner, due date



4 Meeting lead checks
Fix owners and dates

HUMAN CHECK



5 Tasks go live
HubSpot project and task queue



6 Monday cleanup
Duplicates and missing dates

HUMAN CHECK

No task goes live without an owner and a date.

STEP 1 | Turn on Notetaker with consent

WHEN: Once. | **WHERE:** HubSpot settings and meeting invites. | **HUMAN CHECK:** Leanne approves the consent wording.

SETUP AND ACTION: Connect Google Meet and Zoom to HubSpot Meeting Notetaker for each person with a Sales Hub Professional seat. Add this line to every client meeting invite: "We use an AI notetaker to capture action items. Just let us know if you'd rather we didn't record." If a client declines, take notes in a Google Doc and run Prompt 2A on the notes in the AI workspace.

No AI prompt at this step

Notetaker joins client meetings, and every client knows it.

STEP 2 | Load the LL-BC summary template

WHEN: Once, then whenever the format needs tuning. | **WHERE:** HubSpot Notetaker summary template, or the AI workspace for meetings that weren't recorded. | **HUMAN CHECK:** Stephanie tests it on three past meetings.

SETUP AND ACTION: Build a custom Notetaker summary template using the five sections and rules below. When you only have typed notes, run the full prompt in the client's AI project.

PROMPT 2A: LL-BC MEETING SUMMARY

COPY AND PASTE

Summarize this client meeting for the LL Business Collective team.

CLIENT: [CLIENT NAME]

MEETING DATE: [DATE]

ATTENDEES: [NAMES AND ROLES]

TRANSCRIPT OR NOTES

[TRANSCRIPT]

RETURN THESE SECTIONS

1. Decisions made
2. Action items, one per line: what, who (LL-BC person or client), due date if stated, related project
3. Open questions waiting on someone
4. Dates and deadlines mentioned, with the day of the week
5. New client details worth adding to the client reference guide (names, events, preferences)

RULES

- Only list an action item if someone agreed to do it.
- If no owner or due date was stated, write "Owner needed" or "Date needed." Do not guess.
- Keep each line short and plain.

Expected output and next handoff

A consistent summary on every meeting record, with action items ready to become tasks.

STEP 3 | Confirm and create tasks

WHEN: The same day as the meeting. | **WHERE:** The HubSpot meeting record. | **HUMAN CHECK:** The meeting lead confirms every owner and date.

SETUP AND ACTION: Open the meeting record, review the action items, and create tasks for LL-BC's items. Link each task to the client company and project and set priority (High if due this week). Put client-owned items in the follow-up email and create one "Waiting on client" task to track them.

No AI prompt at this step

Confirmed tasks in the right queues before the day ends.

STEP 4 | Turn emails into tasks

WHEN: A client email asks for work. | **WHERE:** Gmail label To HubSpot, then Zapier, then HubSpot. | **HUMAN CHECK:** Stephanie or the assignee confirms each draft task.

SETUP AND ACTION: Apply the To HubSpot label with one click. Zap 1 sends the email through Prompt 2B and creates a "DRAFT:" task in the reviewer's queue with the email link. The reviewer checks it, removes "DRAFT:", and it's live.

PROMPT 2B: EMAIL TO TASK

COPY AND PASTE

Read this client email and pull out the work requests for LL Business Collective.

EMAIL FROM: [SENDER NAME AND EMAIL]
RECEIVED: [DATE]

EMAIL
[EMAIL BODY]

TEAM AND WHAT THEY OWN
[TEAM ROSTER FROM THE PLAYBOOK]

RETURN JSON ONLY

```
{
  "client_company": "",
  "tasks": [
    {
      "title": "Verb first, under 10 words",
      "details": "",
      "suggested_owner": "",
      "due_date": "YYYY-MM-DD or null",
      "due_date_source": "stated | implied | none",
      "priority": "High | Normal",
      "confidence": "High | Medium | Low"
    }
  ],
  "questions_for_client": [],
  "no_task_reason": ""
}
```

RULES

- High priority only if due within 7 days of the received date.
- Never invent a due date. Use null if none is stated.
- If the email has no work request, return an empty tasks list and explain why in no_task_reason.

Expected output and next handoff

A draft HubSpot task with the client, a suggested owner, and the email link.

STEP 5 | Monday task cleanup

WHEN: Monday morning, before the team huddle. | **WHERE:** AI workspace with the HubSpot connector. | **HUMAN CHECK:** Stephanie approves every merge, close, or change.

SETUP AND ACTION: Run Prompt 2C, then make the approved fixes in HubSpot. Ten minutes keeps HubSpot honest.

PROMPT 2C: MONDAY TASK CLEANUP

COPY AND PASTE

Using the HubSpot connector, review open LL-BC tasks.

Find:

1. Tasks with no due date or no owner
2. Likely duplicates (same client, similar title, created within 14 days)
3. Tasks more than 7 days past due
4. Tasks still marked "DRAFT"
5. Tasks that look finished based on a later email, note, or meeting (show the evidence)

Return one table per group with task name, client, owner, due date, and suggested fix.
Do not change any record. List the changes for Stephanie to approve.

Expected output and next handoff

A short fix list. Stephanie updates HubSpot.

TEST AND ACTIVATE

Test cases

- Meeting with clear action items
- Meeting where nobody claimed an item
- Client declines recording
- Email with two separate requests
- FYI email with no request
- Email that says "by Friday"
- Same request sent twice

Ready to go live when

- 90% of client meetings have confirmed tasks the same day
- No DRAFT tasks older than two days
- No open tasks without an owner or date
- A full month with no missed client request

WORKFLOW 3 OF 5

Client Reference Guides

GOAL

Capture what makes each client different so anyone on the team can serve them well, even when Leanne or Stephanie isn't in the room.

PLANNING ESTIMATE

4-8 hours per month

OWNERS

Business owner: Leanne | Workflow owner: Stephanie | Approvers: Leanne or Stephanie

TOOLS

AI workspace client projects, Google Drive, HubSpot company records, a phone voice memo app

INPUTS

Signed agreement and scope, brainstorm notes and project plan, key HubSpot emails, recent deliverables, Leanne's voice interview

CLIENT REFERENCE GUIDES

1 Gather the files
Agreement, notes, emails, past work



2 Leanne talks it through
A short voice memo interview



3 AI drafts the guide
Same format for every client



4 Leanne or Stephanie checks
Line by line

HUMAN CHECK



5 Save and link
Drive, HubSpot, AI project



6 Monthly refresh
AI suggests, a person approves

HUMAN CHECK

AI never edits a guide on its own.

STEP 1 | Gather the source files

WHEN: Once per client. | **WHERE:** The client's 02 Reference Guide folder in Drive. | **HUMAN CHECK:** None at this step.

SETUP AND ACTION: Collect the signed agreement, the brainstorm notes, the project plan, the last three months of key emails (export from HubSpot or Gmail), and 3-5 recent deliverables. Upload them to the client's AI project.

No AI prompt at this step

Everything the AI needs, in one place.



STEP 2 | Prepare and record Leanne's interview

WHEN: Once per client. | **WHERE:** Client project, then a phone voice memo. | **HUMAN CHECK:** Leanne answers in her own words.

SETUP AND ACTION: Run Prompt 3A. Leanne answers the questions out loud in one voice memo. Transcribe it (most phone recorders and Google Docs voice typing can) and add the transcript to the client project.

PROMPT 3A: INTERVIEW PREP

COPY AND PASTE

Read the files for [CLIENT NAME] in this project.

List up to 12 questions Leanne should answer out loud so the team understands this client. Focus on what the files do not already say.

Always include:

- Who really makes decisions and who needs to approve work
- Recurring events, campaigns, or seasons, and whether their names or formats change year to year
- Words, topics, or images to avoid
- What this client loves and what frustrates them
- History the team should know before any meeting

Return the questions as a numbered list Leanne can answer in one voice memo.

Expected output and next handoff

A transcript that captures what only Leanne knows.

STEP 3 | Draft the guide

WHEN: Right after the interview. | **WHERE:** Client project. | **HUMAN CHECK:** Leanne or Stephanie verifies every line.

SETUP AND ACTION: Run Prompt 3B. Every client gets the same ten sections so the team always knows where to look.

PROMPT 3B: CLIENT REFERENCE GUIDE BUILDER

COPY AND PASTE

Use the LL-BC System Prompt.

TASK

Write the client reference guide for [CLIENT NAME] using only the files and interview transcript in this project.

USE THIS EXACT FORMAT (two pages maximum)

1. Client snapshot: who they are, what they do, who they serve
2. Key contacts: name, role, what they approve, how they like to communicate
3. Services in scope: what LL-BC does for them, and what is out of scope
4. Recurring events and campaigns: name, timing, format, and past names (for example, an event that alternates between an evening gala and a lunch with a different name each year)
5. Brand voice: tone, words to use, words to avoid, three sample phrases
6. Visual rules: colors, fonts, logo use, photo style, what to avoid
7. Approvals: who signs off on what, and how much lead time they need
8. History and watch-outs: what the team should know before any meeting
9. Where things live: HubSpot record, Drive folders, brand kit, reports
10. Open questions: anything the sources did not answer

RULES

- Cite the source file for each fact in brackets.
- If sources disagree, show both and mark "Needs review."
- Do not fill gaps with assumptions. Put them in Open questions.

Expected output and next handoff

A two-page draft guide with sources and open questions.

STEP 4 | Verify and publish

WHEN: Same week. | **WHERE:** Google Docs, HubSpot, the client's AI project. | **HUMAN CHECK:** Leanne or Stephanie approves the final version.

SETUP AND ACTION: Check each line, answer the open questions, and save it as a Google Doc named "Client Reference Guide" plus the client name in the 02 Reference Guide folder. Paste the link into the Reference Guide property on the HubSpot company record, and replace the draft in the client's AI project with the approved version.

No AI prompt at this step

One approved guide, linked everywhere the team works.

STEP 5 | Prep for client meetings

WHEN: The day before any client meeting. | **WHERE:** Client project, with the HubSpot connector on. | **HUMAN CHECK:** The meeting lead reads it and corrects anything stale.

SETUP AND ACTION: Anyone on the team can now walk in prepared. This is where the guide pays off.

PROMPT 3C: MEETING PREP BRIEF

COPY AND PASTE

I have a meeting with [CLIENT NAME] on [DATE]. Purpose: [PURPOSE].

Using the client reference guide and recent HubSpot activity, give me:

1. Three things to know walking in
2. Open tasks and where they stand
3. Events or deadlines in the next 60 days, with weekdays
4. Names and roles of people likely in the room
5. Two good questions to ask

Keep it to one screen.

Expected output and next handoff

A one-screen brief for the meeting lead.

STEP 6 | Refresh the guide monthly

WHEN: First Monday of each month. | **WHERE:** Client project. | **HUMAN CHECK:** Leanne or Stephanie approves each change.

SETUP AND ACTION: Add the month's meeting summaries and key emails to the project, then run Prompt 3D.

PROMPT 3D: GUIDE UPDATE CHECK

COPY AND PASTE

Compare the current client reference guide for [CLIENT NAME] with this month's meeting summaries and key emails.

List only proposed changes in a table: section, current text, proposed text, source, reason.

Flag anything that contradicts the guide.

Do not rewrite the guide. A person will approve each change.

Expected output and next handoff

An up-to-date guide without a rewrite.

TEST AND ACTIVATE

Test cases

- Client with an event that changes names each year
- Contact who changed roles
- Agreement and email that disagree
- Out-of-scope request
- New contractor preps using only the guide

Ready to go live when

- All six guides approved
- Every guide linked on its HubSpot company record
- A new team member answers five client questions using only the guide
- One monthly refresh completed

WORKFLOW 4 OF 5

Content Engine with Proof Check

GOAL

Faster monthly content that still looks and sounds like each client, with every piece checked before a client or the public sees it.

PLANNING ESTIMATE

8-18 hours per month

OWNERS

Business owner: Leanne | Workflow owner: Stephanie, with a named backup | Template designer: LL-BC's designer | Checker: the person who made the piece

TOOLS

AI workspace client project, Canva Business (brand kits, templates, Bulk Create), Google Sheets, a Proof Log sheet, LL-BC's current social scheduler

INPUTS

Client reference guide, monthly themes and key dates, client photos, best past posts, the client's template names

CONTENT ENGINE WITH PROOF CHECK

1

Plan the month

Themes, dates, and events



2

AI drafts the calendar

Captions in the client's voice



3

Stephanie edits

Voice, facts, and fit

HUMAN CHECK

4

Canva fills templates

Bulk Create from one table



5

AI proof check

Dates, names, details, brand



6

Fix and approve

Creator fixes, client approves

HUMAN CHECK

People design the look once. AI fills it in and checks it.

STEP 1 | Build the client's content instructions

WHEN: Once per client, refreshed when the guide changes. | **WHERE:** Client project. | **HUMAN CHECK:** Stephanie reads and adjusts before saving.

SETUP AND ACTION: Upload the client reference guide and the client's 10 best past posts, then run Prompt 4A. Paste the result into the client project's instructions.

PROMPT 4A: CLIENT CONTENT INSTRUCTIONS BUILDER

COPY AND PASTE

Read the client reference guide for [CLIENT NAME] and the 10 best past posts in this project.

Write project instructions for this client's content assistant. Include:

- Who the audience is and what they care about
- The client's voice in five short rules, with three example sentences
- Words, topics, and claims to avoid
- Event and program names exactly as the client uses them
- Hashtag and emoji habits based on the past posts
- Call-to-action options the client uses
- A rule to flag any date, name, or claim not found in the guide

Write it as instructions to an assistant, under 400 words, with no blanks or placeholders.

Expected output and next handoff

Client-specific instructions that keep every caption on voice.

STEP 2 | Build the brand templates

WHEN: Once per client. | **WHERE:** Canva Business. | **HUMAN CHECK:** Stephanie approves the template set.

SETUP AND ACTION: The designer builds 6-10 locked templates per client using that client's brand kit and real photos, with text boxes named headline, subhead, body, cta, and date_line. This is the step that keeps designs from looking like every other AI graphic.

No AI prompt at this step

A template set for each client, ready for Bulk Create.

STEP 3 | Draft the monthly calendar

WHEN: Once a month per client. | **WHERE:** Client project. | **HUMAN CHECK:** Stephanie edits every row.

SETUP AND ACTION: Fill in the brackets from the client guide, client emails, and the template list. The output table drops straight into Canva.

PROMPT 4B: MONTHLY CONTENT CALENDAR

COPY AND PASTE

Plan [MONTH AND YEAR] social content for [CLIENT NAME].

POSTS PER WEEK: [NUMBER] on [PLATFORMS]

THEMES AND PRIORITIES THIS MONTH: [THEMES]

KEY DATES AND EVENTS: [DATES FROM THE CLIENT GUIDE AND CLIENT EMAILS]

AVAILABLE PHOTOS OR ASSETS: [LIST]

TEMPLATE NAMES: [THIS CLIENT'S CANVA TEMPLATE NAMES]

RETURN A TABLE WITH THESE COLUMNS

date | weekday | platform | template_name | headline | subhead | body | cta | date_line | photo_note | source_for_any_fact

RULES

- Use only the template names listed above.
- Headline under 8 words. Subhead under 12 words.
- Write captions in the client's voice. No two posts start the same way.
- Every date and event name must match the client guide. Put the source in the last column.
- Mark anything uncertain "Needs review."

Expected output and next handoff

A month of posts in one table, ready for edits.

STEP 4 | Make it sound human

WHEN: After Stephanie's first edit. | **WHERE:** Client project. | **HUMAN CHECK:** Stephanie keeps or rejects each rewrite.

SETUP AND ACTION: Run Prompt 4C on the caption column. It keeps strong captions and only rewrites the ones that sound generic.

PROMPT 4C: HUMAN VOICE PASS

COPY AND PASTE

Review these captions for [CLIENT NAME].

Rewrite any caption that:

- could belong to any company (too generic)
- sounds like AI (stacked adjectives, words like "unlock" or "elevate," em dashes, a three-item list in every post)
- doesn't follow the client's voice rules
- is longer than it needs to be

Keep the facts the same. Return a table: original | rewrite | what changed.

Leave strong captions alone and mark them "Keep."

Expected output and next handoff

Captions that sound like the client, not like a chatbot.

STEP 5 | Fill the templates in Canva

WHEN: After captions are final. | **WHERE:** Canva Bulk Create. | **HUMAN CHECK:** Stephanie approves every design.

SETUP AND ACTION: Export the final table as a CSV, open the client's template, choose Bulk create, connect each column to its text box, and generate. Swap any photos that don't fit.

No AI prompt at this step

A month of on-brand designs, ready for the proof check.

STEP 6 | Run the proof check

WHEN: Before anything goes to a client: social graphics, captions, emails, brochures, and flyers. | **WHERE:** Client project. | **HUMAN CHECK:** The creator reviews every flag.

SETUP AND ACTION: The check is only as good as what it compares against. Make sure the client guide is in the project, attach the image or PDF (or paste the text), and paste the brief or calendar row into the prompt.

PROMPT 4D: PROOF AND FACT CHECK

COPY AND PASTE

Proof this [SOCIAL GRAPHIC / CAPTION / EMAIL / BROCHURE / FLYER] for [CLIENT NAME] before it goes to the client.

DRAFT
[ATTACH THE IMAGE OR PDF, OR PASTE THE TEXT]

WHAT IT SHOULD SAY
[THE BRIEF OR CALENDAR ROW]

CHECK EACH ITEM AND MARK IT PASS OR FIX

1. Dates: every date matches its weekday and matches the brief
2. Times, places, prices, phone numbers, emails, and web addresses
3. Names: people, titles, the client's business name, and event or program names (exact match to the client guide, including this year's event name)
4. Spelling and grammar
5. Brand: colors, logo use, and voice rules from the guide
6. Claims: anything that needs a source or could mislead
7. Compliance flags: missing unsubscribe or sender details in emails, political or fundraising language, photo permissions

RETURN

- Overall: PASS or FIX
- A numbered fix list: what, where on the piece, why, and a suggested correction
- Anything you could not check

Do not rewrite the piece.

Expected output and next handoff

A short PASS or FIX list.

STEP 7 | Fix, second read, log, and schedule

WHEN: Right after the check. | **WHERE:** The design or document, the Proof Log sheet, then the scheduler. | **HUMAN CHECK:** A second person reads print pieces, email campaigns, and event materials. The client approves as usual.

SETUP AND ACTION: Fix every flag or note why it's fine. For print and campaigns, a second person reads the final against the brief. Add one row to the Proof Log: date, client, piece, and what was caught. Then send to the client for approval and schedule in the tool LL-BC uses today.

No AI prompt at this step

Approved, error-checked content, plus a log of what the check caught.

TEST AND ACTIVATE

Test cases

- Month with a recurring client event
- Caption that repeats last month's opening
- Planted error: wrong weekday on an event date
- Planted error: last year's event name
- Planted error: misspelled board member name
- Email with no unsubscribe link
- Logo in the wrong color

Ready to go live when

- Two monthly batches done with less editing time
- No client feedback that posts "sound like AI"
- The check catches at least 9 of 10 planted errors
- Every piece is logged
- Zero date or name errors reach a client

WORKFLOW 5 OF 5

Client File Capture in Google Drive

GOAL

Every client's current files live in one predictable Drive folder, so nobody digs through email or asks a client to resend a file LL-BC made.

PLANNING ESTIMATE

4-11 hours per month

OWNERS

Business owner: Leanne | Workflow owner: Stephanie | File confirmer: the project owner for that client

TOOLS

Gmail, Google Drive with Ask Gemini in Drive, Zapier (Zap 2 with an AI step), HubSpot company records

INPUTS

The client folder standard, a Client Lookup sheet (client, email domains and addresses, folder links), the file naming rule, each client's active projects

CLIENT FILE CAPTURE IN GOOGLE DRIVE

1 Attachment sent or received

Any client email with a file



2 AI names and sorts it

Standard name, right subfolder



3 Owner confirms unsure ones

From the _To Sort folder

HUMAN CHECK



4 Saved to the client folder

Link noted in HubSpot



5 Weekly folder check

Duplicates and old versions

HUMAN CHECK



6 Find any file by asking

Gemini in Drive returns the link

Nothing gets deleted. Files are moved or flagged.

STEP 1 | Set the folders, names, and lookup sheet

WHEN: Once, before turning on Zap 2. | **WHERE:** Google Drive and Google Sheets. | **HUMAN CHECK:** Leanne approves the naming rule.

SETUP AND ACTION: Create one top-level Clients folder in Drive, owned by an LL-BC company account rather than a person (a shared drive works too). Inside it, add one folder per client with the six standard subfolders, plus one _To Sort folder. Use one naming rule for every file: Client_Project_Description_YYYY-MM-DD_v1, for example ClientName_FallGala_Brochure_2026-10-05_v2.pdf. Build a Client Lookup sheet with each client's name, email domains, any personal email addresses their contacts use, active projects, and links to their Drive folder and HubSpot record. Then move today's loose files from inboxes and HubSpot into the right folders once.

No AI prompt at this step

A clean, predictable home for every client file. Move to Step 2.



STEP 2 | Turn on automatic filing

WHEN: Every client email with an attachment, sent or received. | **WHERE:** Zapier Zap 2 with an AI by Zapier step. | **HUMAN CHECK:** Stephanie reviews the first two weeks of results.

SETUP AND ACTION: Zap 2 sends each attachment's details through Prompt 5A. High-confidence files get their new name and go straight to the client folder with a link on the HubSpot company record. Everything else lands in _To Sort.

PROMPT 5A: FILE SORT

COPY AND PASTE

Decide where this email attachment belongs in LL Business Collective's Google Drive.

CLIENT FROM LOOKUP: [CLIENT NAME OR "NO MATCH"]
 DIRECTION: [SENT BY LL-BC / RECEIVED FROM CLIENT]
 EMAIL SUBJECT: [SUBJECT]
 EMAIL BODY (FIRST 500 CHARACTERS): [BODY]
 ATTACHMENT FILE NAME: [FILE NAME]
 ACTIVE PROJECTS FOR THIS CLIENT: [PROJECT LIST FROM THE CLIENT LOOKUP SHEET]

FOLDERS

- 01 Agreement and Scope: signed agreements, proposals, scopes
- 02 Reference Guide: the client guide and brand notes
- 03 Working Files: drafts and proofs still in progress
- 04 Finals: approved final versions sent to the client, printer, or platform
- 05 Reports: performance reports and recaps
- 06 From Client: logos, photos, copy, and other files the client sent

RETURN JSON ONLY

```
{
  "folder": "01 Agreement and Scope | 02 Reference Guide | 03 Working Files | 04 Finals | 05 Reports | 06 From Client | SKIP",
  "new_file_name": "Client_Project_Description_YYYY-MM-DD_v1.ext",
  "project": "",
  "is_final": true,
  "confidence": "High | Medium | Low",
  "reason": ""
}
```

RULES

- Use SKIP for signature images, calendar invites, and auto-generated files.
- Mark is_final true only if the email says the file is final, approved, or ready to print or post.
- Never guess the client. If the client is "NO MATCH," set confidence to Low.
- Keep the original file extension. Use the email date if the file name has no date.
- Use only letters, numbers, and underscores in the new file name.

Expected output and next handoff

Each client file renamed and filed, or parked in _To Sort for a person to place.

STEP 3 | Clear the _To Sort folder

WHEN: Every day, from the HubSpot task Zap 2 creates. | **WHERE:** Google Drive. | **HUMAN CHECK:** The project owner places each file.

SETUP AND ACTION: Open _To Sort, move each file to the right client folder, and fix the name if needed. If a client keeps landing here, add their missing email address or domain to the Client Lookup sheet so it files itself next time.

No AI prompt at this step

An empty _To Sort folder at the end of each day.

STEP 4 | Run the weekly folder check

WHEN: Every Friday. | **WHERE:** Ask Gemini in Drive, with the client's folder @-mentioned (or the AI workspace's Drive connector). | **HUMAN CHECK:** Stephanie approves every move, rename, or archive.

SETUP AND ACTION: Run Prompt 5B, then make the approved changes in Drive. Old versions go to an Archive subfolder, never the trash.

PROMPT 5B: WEEKLY FOLDER CHECK

COPY AND PASTE

Review the files in the [CLIENT NAME] client folder and its subfolders.

Find:

1. Files that break the naming rule: Client_Project_Description_YYYY-MM-DD_v1
2. Likely duplicates (same name or same content in different places)
3. Older versions sitting in 04 Finals when a newer version exists
4. Files that look like they're in the wrong subfolder, based on name or content
5. Anything left in _To Sort for more than two business days

Return one table per group: file name, current location, suggested action, reason.
Do not move, rename, or delete anything. List the changes for Stephanie to approve.

Expected output and next handoff

A short fix list that keeps every client folder current.

STEP 5 | Find any file by asking

WHEN: Anyone needs a current file. | **WHERE:** Ask Gemini in Drive, or the Drive Folder link on the HubSpot company record. | **HUMAN CHECK:** None. This step only reads files.

SETUP AND ACTION: Instead of searching inboxes, open Drive and ask Gemini. At project wrap-up, the project owner also confirms the finals are in 04 Finals before moving the HubSpot project to Done.

PROMPT 5C: FIND A FILE

COPY AND PASTE

Find the latest version of [WHAT YOU NEED, FOR EXAMPLE "THE FALL BROCHURE"] in the [CLIENT NAME] client folder.

Return:

1. The file name and link
2. The folder it's in
3. The date it was last changed
4. Any other versions, with links, and which one is newest

If you can't find it, say so and list the three closest matches. Do not guess.

Expected output and next handoff

The right file and link in seconds, without digging through email.

TEST AND ACTIVATE

Test cases

- Client sends a logo only in their email signature (should skip)
- Final brochure sent to a printer, not the client
- Same file sent twice
- Client contact using a personal Gmail address
- New contact at an existing client's domain
- Two versions of one final

Ready to go live when

- 95% of client attachments land in the right folder with no help for two weeks
- _To Sort is cleared every day
- No one asks a client to resend an LL-BC file for a month
- Anyone can find a current file in under a minute

PART 4

Go Live

Use this checklist before calling any workflow done, and again each quarter.

ACTIVATION AND ONGOING CONTROL

Go-Live Checklist

A workflow is ready for daily use only when Leanne and Stephanie can check every box below.

Control	What must be true	Done
Owners	Every workflow has a named owner and reviewer, and a backup.	☐
Accounts	Everyone uses LL-BC company accounts. No client data in personal or free AI tools.	☐
Prompts	Approved prompts are saved in the LL-BC AI Playbook with a version date.	☐
Client guides	All six guides are approved and linked on their HubSpot company records.	☐
Consent	Client meeting invites include the recording notice.	☐
Automations	Zap errors alert Stephanie, and the Playbook explains how to pause each one.	☐
Measurement	Baseline counts are captured and the ROI measures are reviewed monthly.	☐
Offboarding	A contractor access checklist exists and is used the day someone leaves.	☐

Production rule

Don't reduce human review because a small test looked good. Ease off only after weeks of real work show steady accuracy.

Ownership rule

Don't let any workflow live inside one person's account. Use LL-BC accounts, shared folders, and named backups so the system keeps running when people or roles change. ISW Consulting is available per request if something breaks or needs to change.