08

FREE GUIDE

10 copy-paste AI workflows for small business

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INSIDE

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The plan

1. Pick the one job below you put off most often. The invoice chaser is a good first choice.
2. Set it up once: make a project in ChatGPT or Claude and paste in the saved instructions for that workflow.
3. Each time the job comes round, open the project, paste the prompt with your details, check the draft, and send it yourself.

Try this now: the invoice chaser

Use it when an invoice is past due and you've been putting off the awkward email. Paste this into **chatgpt.com** or **claude.ai**, fill in the brackets, and send.

> COPY THIS
>
> An invoice is overdue and I need to chase it. Details: invoice number [number], for [what the work was], sent on [date], due on [date], amount [amount], and it's now [number] days late. This is reminder number [1, 2 or 3]. Our payment options are [e-transfer to ... / card by phone / cheque]. Write a short email to the customer. Reminder 1 is friendly and assumes they forgot. Reminder 2 is polite but firmer and asks for a payment date. Reminder 3 is formal, states the amount and the date it was due, and says what happens next: [our next step, for example "we'll call you" or "we'll pause further work"]. Under 120 words. Don't threaten anything I haven't listed. Don't add late fees or interest unless I've listed them here: [none / the terms printed on the invoice].

Check the invoice number, amount and dates against your accounting app. If the customer has already raised a problem with the work, don't send a reminder; call them.

1. Start here if you've never used AI

ChatGPT and Claude are AI assistants. You type a message on their website or phone app and they write an answer back. ChatGPT is made by OpenAI, Claude by Anthropic. Every workflow in this kit works in either one, and both have free plans.

A workflow is a job you do every week, set up once. You save the rules for that job (your tone, your policies, what to never do) in one place. After that you only paste in this week's details.

The place you save it is called a project. A project is a folder inside ChatGPT or Claude with its own instructions and files. Every chat you start inside it follows those instructions. Both tools offer projects on the free plan, with limits: on ChatGPT's free plan a project holds up to five files, and Claude's free plan allows up to five projects. Limits change, so check each tool's plan page. It's enough to start with your two or three most common jobs.

It writes; you send. In these workflows the assistant can't email your customer or post for you. It gives you a draft. You read it, fix it, and send it yourself, so nothing goes out that you haven't seen.

It can be wrong and sound sure. It may invent a date, a price or a policy. That's why every workflow ends with a "what to check" list.

Keep private details out. Take out names, addresses, phone numbers, health details and account numbers before you paste anything. Write "Customer A" instead. It doesn't need to know who the customer is to write the email.

Words you'll see

Word	What it means
Prompt	The message you type to the assistant.
Project	A folder in ChatGPT or Claude with its own saved instructions and files.
Saved instructions	The rules you paste into a project once, so every chat inside it follows them.
Workflow	One repeating job: the saved instructions, the prompt, and the checks.
[Brackets]	The parts you replace with your own details.
Draft	A first version you read and fix before it goes anywhere.
Transcript	The written-out text of a recording, such as a voice memo or a video call.
Automation	Something that runs a step for you without you pressing a button. Covered at the end.

2. How each workflow is set up

Every workflow below has the same parts: the result, when to use it, what you need, the saved instructions (pasted into the project once), the prompt (pasted each time), a worked example from a made-up business, and what to check before anything goes out.

Make a project (once per workflow)

1. Open ChatGPT or Claude and sign in.
2. In the sidebar on the left, look for **Projects** and choose to make a new one. On a phone, it's in the side menu.
3. Give it the workflow's name, for example "Invoice chaser".
4. Find the project's instructions box (it may be under the project's settings or a pencil icon) and paste in the saved instructions for that workflow. Fill in the brackets.
5. If the workflow lists files, add them to the project. Take personal details out of them first.
6. From now on, open the project and start each new chat from inside it.
7. Run it once on a made-up invoice or email and read the draft. Fix the saved instructions before you use it on a real customer.

Menus move. If a button named here is missing, look in the sidebar or Settings for something close.

Your business in one paragraph

Write this once and paste it at the top of every project's saved instructions:

> COPY THIS
>
> I run [business name], a [type of business] in [city] with [number] staff. We do [services]. We don't do [things people ask for that we don't offer]. Our customers are mostly [who]. Write in plain, friendly Canadian English with short sentences, no exclamation marks and no jargon. Never invent facts, prices, dates or promises. If you need something I haven't given you, leave it in [brackets] or ask me.

A note on Canada's anti-spam law

Canada's anti-spam law (CASL) covers commercial messages, texts as well as email: anything that promotes your business or asks someone to buy. Government guidance says that after someone buys from you, you have implied consent to send them commercial messages for two years, and after someone makes an enquiry, for six months. Every commercial message also needs your business name, contact details and a way to unsubscribe. A plain invoice reminder isn't a promotion; a follow-up that adds an offer is. If you're unsure, check with a professional.

3. Workflow 1: the invoice chaser

This is the project version of the prompt you tried above, so you stop retyping the rules.

The result: a reminder email that matches how late the invoice is, ready to check and send.

When to use it: once a week, when you look at what's overdue. Pick a regular slot, like Monday morning.

What you need: the list of overdue invoices from your accounting app (number, date sent, due date, amount, days late). Leave the customer names out.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project writes payment reminders for overdue invoices. Rules: Reminder 1 (up to 14 days late): friendly, assume they forgot, include the invoice number, amount, due date and how to pay. Reminder 2 (15 to 30 days late): polite and firmer, ask them to reply with a date they'll pay. Reminder 3 (over 30 days late): formal, state the amount and the original due date, and say our next step, which is [our next step]. Our payment options: [list]. Our payment terms, as printed on our invoices: [terms]. Never add late fees, interest, or threats of collections or legal action unless they are in the payment terms above. Under 120 words. Leave [Customer name] as a bracket for me to fill in.

The prompt:

> COPY THIS
>
> Write reminders for these overdue invoices: [paste the list: invoice number, what the work was, date sent, due date, amount, days late, and whether we've sent a reminder before]. One email per invoice, using the right reminder level, with a subject line on each. Add a two-line text message version of each.

Worked example: This is a made-up business. A three-person bookkeeping office in Langley pastes four overdue invoices each Monday. Two are a week late and get the friendly version. One is on its third reminder, so the draft states the original due date and says the office will phone that week. The owner adds names and sends all four.

What to check:

- [ ] Invoice number, amount and dates match your accounting app
- [ ] The payment options are current
- [ ] Nothing mentions a fee, interest or collections that your terms don't include
- [ ] The customer hasn't already paid or raised a problem with the work
- [ ] If they reply with a dispute, stop the reminders and phone them. Don't paste the reply back in for another reminder

4. Workflow 2: quote follow-up

The result: a gentle follow-up and a final one for every quote that's gone quiet.

When to use it: three to five working days after you send a quote with no reply, and again a week later. After the second, stop.

What you need: the quote or your notes on it, the date sent, and anything the customer said they cared about.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project writes follow-ups on quotes that haven't had a reply. Follow-up 1: friendly, reminds them what the quote was for, answers one likely question [for example: when we could start], and makes it easy to say "not now". Follow-up 2 (final): short, says we'll close the file unless they want to go ahead, and thanks them. Never lower the price, offer a discount or invent a deadline. Never criticize other companies. Under 100 words. Plain text, no bullet points.

The prompt:

> COPY THIS
>
> Quote sent on [date] for [job, in a few words]. What the customer told me mattered to them: [notes, for example "wants it done before school starts", "worried about mess"]. Our earliest start date is [date]. This is follow-up [1 or 2]. Write the email and a two-line text message version.

Worked example: This is a made-up business. A Coquitlam fencing company sends a quote to a homeowner who mentioned their dog kept getting out. The first follow-up says the crew could start in two weeks and mentions the gate latch they asked about. The owner sends the text version, since that's how the customer first got in touch.

What to check:

- [ ] The start date is one you can actually meet
- [ ] No discount or price change crept in
- [ ] It mentions what they told you, in their words, not a generic line
- [ ] If it adds anything promotional, you're inside the six months since their enquiry (see section 2)

5. Workflow 3: review requests

The result: a short, personal review request for each finished job, and replies to new reviews.

When to use it: the day a job or appointment wraps up, while the customer still remembers it. Reply to new reviews once a week.

What you need: your Google review link. Google's Business Profile help explains how to get a link or QR code to your review form; search "Get Google reviews" there. Have a line on what you did for each customer.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project writes review requests and review replies. Review requests: under 50 words, thank them for one specific thing, include our review link [link], and make it easy to ignore. Never offer anything in return for a review. Ask every customer the same way, not only the ones we think were happy. Review replies: good reviews get two or three sentences that mention one thing they said. Bad reviews get a calm reply under 80 words that doesn't argue, doesn't share anything private about the customer, and offers to talk at [phone or email].

The prompt (request):

> COPY THIS
>
> Finished jobs this week: [one line each, for example "Customer A, replaced kitchen faucet, was worried about the old shut-off valve"]. Write a text message and an email version of the review request for each.

The prompt (reply):

> COPY THIS
>
> New reviews: [paste each review]. For any bad review, here's what happened on our side: [notes]. Write a reply for each.

Worked example: This is a made-up business. A Burnaby massage clinic writes one line per client at the end of each day ("first visit, came in for shoulder pain"). The front desk sends the drafts. No health details go into the assistant; "first visit" is enough.

What to check:

- [ ] Nothing offers a discount, gift or draw entry for a review (Google's rules forbid it)

- [ ] No health, legal or financial details about the customer appear in a public reply
- [ ] The review link opens the right business
- [ ] You're sending to people who bought from you in the last two years, or who agreed to hear from you

6. Workflow 4: inbox triage (sort, draft, flag)

The result: your inbox sorted into "answer today", "can wait" and "ignore", with drafts for routine replies and a flag on anything risky.

When to use it: first thing in the morning, or after a day away.

What you need: the day's emails, with names and contact details removed. Copy and paste works in any email app. Start with the ten newest. Copy each email's subject and first few lines; the assistant doesn't need the whole thread. Both tools can also connect to some email accounts. Look in Settings for something called Plugins, Apps or Connectors; what's offered depends on your plan. If you try it, start with read-only access and keep sending in your own hands.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project sorts my email. For each email I paste: 1. Put it in one group: Answer today, Can wait, or Ignore (newsletters, cold sales pitches, spam). 2. For routine questions we answer often (hours, booking, where we are, what we charge for [service]), draft a reply using only the facts in this project's files. 3. Flag, don't draft, anything about: a complaint, a refund, a legal letter, an injury or safety issue, a staff matter, or a payment problem. Say in one line why it's flagged. Show the result as a table: sender (as Email 1, Email 2...), group, one-line summary, and draft or flag.

Add one file to the project: your standard answers (hours, address, booking steps, common questions). The 30-prompts guide at joe.droom.ca/30-prompts has a prompt that writes these for you.

The prompt:

> COPY THIS
>
> Here are this morning's emails, names removed, separated by lines: [paste]. Sort them.

Worked example: This is a made-up business. A New Westminster property manager pastes the overnight emails at 8am. Three are routine (parking, a move-in date, laundry room hours) and get drafts. One mentions water coming through a ceiling and is flagged. That one gets a phone call.

What to check:

- [ ] Read every flagged email yourself, fully, before doing anything else
- [ ] Drafts use only facts from your standard answers
- [ ] Nothing in "Ignore" is from a real customer

7. Workflow 5: weekly numbers report

The result: a one-page summary of last week from your spreadsheet: what moved, and three questions worth asking.

When to use it: Monday morning, before the team meeting.

What you need: a spreadsheet you already keep: sales by day, jobs booked, hours worked. Both tools can read a spreadsheet you attach (look for the paperclip or plus button by the message box), or you can paste the rows. Take out customer names first.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project reads my weekly numbers. Each week I'll attach or paste a spreadsheet. The columns are: [list them and what each means, for example "Jobs = jobs completed, Booked = new bookings taken that day"]. Write a report under 200 words: 1. This week's totals next to last week's and the same week last year, if the sheet goes back that far. 2. The two biggest changes, in plain words. 3. Anything that looks like a data error (a blank day, a number far outside the usual range). 4. Three questions I should ask my team. Show your working for every total. Never guess a number that isn't in the data. If you can't calculate something, say so.

The prompt:

> COPY THIS
>
> Here's last week's data: [attach or paste]. Write this week's report.

Worked example: This is a made-up business. A Surrey bakery keeps a daily sheet of sales by category. The report notes that Saturday bread sales dropped while pastry held steady, that Wednesday is blank (the till wasn't exported), and asks whether shelves were empty by noon on Saturday.

What to check:

- [ ] Spot-check two totals against the spreadsheet yourself
- [ ] A "trend" from one week is a question, not a conclusion
- [ ] Blank or odd days were real, not an export mistake

8. Workflow 6: job ad and interview questions

The result: a job ad, interview questions, and a scoring sheet so every candidate is judged on the same things.

When to use it: each time you hire. Save the project and the next ad is mostly done.

What you need: notes on the daily work, the hours, the location and the pay.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project writes job ads and interview materials. Job ads: under 250 words, plain language, no clichés ("fast-paced", "rock star", "wear many hats"). Include the pay or pay range I give you, the hours, the location, and how to apply. Never include wording that shows a preference based on age, sex, race, religion, family status, disability or any other ground protected by human rights law. Say "must be able to lift 20 kg" rather than describing the kind of person. Interview questions: eight questions that ask how someone handled a real situation before. For each, say what a strong and a weak answer sound like. Scoring sheet: a table with each question, a 1 to 3 score, and a notes column.

The prompt:

> COPY THIS
>
> Role: [title]. [Full time / part time], [hours], at [location]. Pay: [amount or range]. What they'd do on a normal day: [notes]. The hardest parts of the job: [notes]. What matters most to me: [notes about the work, not the person]. How to apply: [instructions]. Write the ad, the interview questions and the scoring sheet.

Worked example: This is a made-up business. A Maple Ridge auto shop needs a service advisor. The owner's notes say "calm on the phone, can explain a repair without talking down". The questions come back built around that: "Tell me about a time a customer was upset about a bill. What did you say?"

What to check:

- [ ] **In BC, publicly posted job ads must include the expected pay or a pay range.** The province's Pay Transparency Act requires it, and "competitive wage" doesn't count. A range needs a bottom and a top, so "up to" a figure doesn't count either. Other provinces have their own rules, so check yours.
- [ ] Nothing describes the kind of person you want instead of the work
- [ ] The duties are ones this person will actually do
- [ ] For anything about firing, discipline or contracts, talk to an employment adviser

9. Workflow 7: new customer welcome pack

The result: a welcome email and a one-page "what happens next" sheet for every new customer.

When to use it: the day someone books, signs or pays a deposit. Set it up once and each welcome is a paste and a read.

What you need: notes on what happens after someone says yes: the steps, who they'll hear from, what they need to prepare, and your policies (cancellations, changes, payment).

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project writes welcome packs for new customers. Use only the steps and policies in this project's files. Welcome email: under 150 words. Thank them, confirm what they booked and when, say the one thing they need to do next, and give our contact details. "What happens next" sheet: a numbered list of the steps from booking to finished, with who does each step and roughly when. Then a short "Good to know" section with our policies in plain words. Fits on one page. Don't add upsells or offers.

Add one file: your process and policies, in rough notes if that's all you have.

The prompt:

> COPY THIS
>
> New customer: [what they booked], starting [date], at [location, or "online"]. Anything special about this one: [notes, for example "has a dog", "needs parking at the back"]. Write the welcome email and the sheet.

Worked example: This is a made-up business. A Richmond renovation contractor sends every new client the same sheet: site visit, final quote, deposit, material order, start date, walk-through. The crew lead's name is on it, so clients know who's arriving.

What to check:

- [ ] Dates, times and addresses match the booking
- [ ] Policies match what's printed on your contract or website
- [ ] No promise about timing you can't keep

10. Workflow 8: meeting notes to action list

The result: from messy notes or a transcript, a clean list of decisions, actions (who and by when) and open questions.

When to use it: straight after a team meeting, site meeting or supplier call, while you remember what was meant.

What you need: your notes, or a transcript. Some video call and voice-memo apps make one; look in their settings. If you record a meeting, tell everyone first. Keep the transcript out of the project's files unless staff know it's there; once names are in it, it's personal information under BC's privacy law.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project turns meeting notes into action lists. Output, in this order: 1. Decisions made (one line each). 2. Actions: a table with what, who, and by when. If an action has no owner or no date, write "NO OWNER" or "NO DATE" in capitals. 3. Open questions nobody answered. 4. A short message I can send to everyone who was there, under 120 words. Only include what's in the notes. If something is unclear, list it under open questions instead of guessing.

The prompt:

> COPY THIS
>
> Meeting: [what it was], [date], with [roles, not names, for example "office manager, two crew leads"]. Notes: [paste]. Write the action list and the follow-up message.

Worked example: This is a made-up business. After a Monday crew meeting, a North Vancouver landscaper talks into a voice memo, pastes the transcript, and gets a table: order mulch for the Lonsdale job (office manager, Tuesday), fix trailer light (NO OWNER), confirm Friday start with the strata (crew lead A, Wednesday).

What to check:

- [ ] Every action has an owner and a date before you send it
- [ ] Nothing was added that wasn't said
- [ ] Remove anything personal about staff before it goes to the group

11. Workflow 9: supplier price comparison

The result: a side-by-side table of supplier quotes showing what each includes and leaves out, plus questions to ask before you choose.

When to use it: any time you get more than one quote, especially when they're laid out differently.

What you need: the quotes, as PDFs or pasted text. Remove your account numbers first.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project compares supplier quotes. Build a table with one column per supplier and these rows: items and quantities, unit price, total before tax, taxes, delivery, lead time, payment terms, warranty or returns, and anything excluded. If one quote leaves out something the others include, mark it "NOT STATED" rather than assuming. Check every total by adding up the lines, and flag any quote where the maths doesn't match. Then list the questions I should ask each supplier before choosing. Don't tell me which to pick; show me the differences.

The prompt:

> COPY THIS
>
> Here are [number] quotes for [what I'm buying]: [attach or paste each, labelled Supplier A, B, C]. What I care about most: [for example "delivery before the 15th", "lowest total", "local pickup"]. Compare them.

Worked example: This is a made-up business. A Chilliwack restaurant gets three quotes for a new walk-in cooler. The cheapest doesn't mention installation or haul-away; the table marks both NOT STATED. The owner phones to ask.

What to check:

- [ ] Add up at least one quote's lines yourself
- [ ] Taxes are shown the same way across all quotes

- [ ] Every NOT STATED gets a phone call or email, not an assumption

12. Workflow 10: monthly social calendar

The result: a month of posts (caption, picture idea and day for each) built from what's actually happening in your business.

When to use it: the last week of each month, for the month ahead. One sitting instead of deciding every morning.

What you need: notes on next month: jobs you'll finish, seasonal questions customers ask, any changes, and photos you have.

Saved instructions:

> COPY THIS
>
> [Your business paragraph.] This project plans my social media posts. Each month, write [number] posts for [Instagram / Facebook / LinkedIn]. Mix four kinds: a job or product we're proud of, an answer to a question customers ask, a look behind the scenes, and a practical seasonal tip. Each post: the day, a caption under 60 words, a picture idea using photos I have or can take, and one clear action (call, book, visit). No emoji, no hashtag walls, no hype words. Never invent a customer quote, a review, a number or an award. Only use facts from my notes. Show it as a table I can copy into a calendar.

The prompt:

> COPY THIS
>
> Next month is [month]. Here's what's happening: [notes]. Photos I have: [short list]. Write the calendar.

Worked example: This is a made-up business. A Kelowna window-cleaning company plans October. The notes mention gutter season, a new crew member, and the question customers always ask ("do you do the insides?"). He swaps two picture ideas for photos he already has.

What to check:

- [ ] Every claim in a caption is true and you can back it up
- [ ] Pictures are yours, or clearly labelled if AI-made
- [ ] Nothing mentions a customer or their home without their permission

13. Running them automatically, later

Run each workflow by hand for a few weeks first, so you find the gaps in your saved instructions.

Once one runs smoothly, some steps can happen on their own. A new row in your overdue invoices sheet could create a draft reminder for you to approve, or a finished booking could trigger the review request. The guide at joe.droom.ca/first-automation walks through setting up your first one. Keep one rule: the automation drafts and a person approves anything that goes to a customer, at least for the first month.

New to the tools themselves? joe.droom.ca/chatgpt-and-claude covers accounts, settings and privacy switches.

14. When it goes wrong

What happened	What to do
It ignored the saved instructions.	Check you started the chat inside the project, not in a normal chat.
The draft has [brackets] left in it.	It needed a fact from you. Fill it in yourself.
It invented a date, fee or policy.	Say: "Only use facts from my notes and this project's files." Then check every number.
It keeps making the same mistake.	Add a line to the saved instructions ("Never mention discounts") instead of correcting it each time.
The numbers report has wrong totals.	Ask it to show the sum line by line. If it's still wrong, the spreadsheet columns may be mislabelled in the instructions.
You hit a limit on the free plan.	Wait for it to reset, or run that workflow in the other tool.
The draft sounds nothing like you.	Paste two emails you were happy with into the saved instructions and add "match this tone".
Staff get different results.	In ChatGPT you can share a project on the free plan. In Claude, sharing needs a Team or Enterprise plan; otherwise give staff the saved instructions to paste into their own project.

15. Printable checklist: before anything goes out

- [ ] Every [bracket] is filled in or removed
- [ ] No customer or staff names, addresses, health details or account numbers were pasted
- [ ] Every amount, date and phone number is checked against the real thing
- [ ] Nothing offers or threatens something you haven't agreed to
- [ ] Commercial messages go only to people you have consent for, with your name, contact details and an unsubscribe
- [ ] You read it once more before sending

One project per workflow. It drafts, you send.