



FREE RESOURCE

AI Starter Checklist

Five practical things to try this week.

You don't need to rebuild your business around AI. You don't need expensive software or a tech consultant. You need five tasks, five prompts, and about thirty minutes. Start here.

01 Write a quote or proposal

02 Draft a client email

03 Summarise a document

04 Build a month of social posts

05 Clean up a spreadsheet

Write a quote or proposal

Est. 5 minutes

WHY THIS MATTERS

Writing quotes from scratch is one of the biggest time drains in any small business. AI doesn't know your pricing — but it does know what a professional quote looks like. Give it your notes, get a polished 80% draft back instantly. You fill in the numbers and send.

WHAT YOU NEED

Your rough notes from the client conversation. Even messy dot points work.

THE PROMPT

COPY THIS PROMPT

I need to write a professional quote for a client. Here are my notes from our conversation: [paste your notes]. My business is [e.g. a plumbing and gas fitting company]. Please write a clear, professional quote that covers the scope of work, includes a placeholder for pricing, and ends with a professional sign-off. Keep the tone friendly but professional.

TIPS

- Add your actual pricing figures before sending — Claude can't calculate your margins.
- If the tone feels too formal, ask: "Can you make this sound more direct and less corporate?"
- Works just as well for proposals, scope-of-works docs, and variation notices.

THE WIN:

Turn 45 minutes of blank-page staring into a 5-minute review-and-send.

Draft a client email

Est. 2 minutes

WHY THIS MATTERS

Whether it's a difficult conversation, a follow-up on an unpaid invoice, or a response to a complaint — the emails that matter most are the ones that take longest to write. AI won't make the decision for you, but it will get you past the blank page.

WHAT YOU NEED

The situation in a few sentences. Who it's to, what happened, what you need to say.

THE PROMPT

COPY THIS PROMPT

I need to write a professional email to a client. Here's the situation: [describe the situation]. The tone should be [professional / warm / firm but polite]. Please write a clear email that [achieves your goal — e.g. follows up on payment / apologises for the delay / responds to their complaint]. Keep it concise.

TIPS

- For sensitive emails, ask Claude for two versions — one softer, one more direct. Pick the one that fits.
- Always read the output before sending. AI doesn't know the full history of the relationship.
- Ask Claude to "tighten it up" if it comes back too long.

THE WIN:

Handle the emails you've been putting off — in minutes, not hours.

Summarise a long document

Est. 60 seconds

WHY THIS MATTERS

Contracts, supplier proposals, insurance policies, council documents — there's no shortage of things you need to understand but don't have time to read in full. Paste it in, ask specific questions, get the answers you actually need.

WHAT YOU NEED

The document text. Copy and paste it directly into Claude.

THE PROMPT

COPY THIS PROMPT

Here is a document I need to understand: [paste the full document text]. Please give me: (1) a 3-sentence summary of what this document is about, (2) the key obligations or commitments it places on me, and (3) anything I should be concerned about or ask a professional to clarify.

TIPS

- For long contracts, you can also ask: "What are the payment terms?" or "Is there a termination clause?"
- Always verify anything high-stakes with your accountant or lawyer — AI can miss nuance.
- Works for meeting notes too: paste them in, ask for a summary and action items.

THE WIN:

Understand what you're signing in 60 seconds instead of 60 minutes.

Build a month of social posts

Est. 30 minutes

WHY THIS MATTERS

Social media falls off the to-do list because it takes time you don't have. With one brief and one prompt, Claude can give you a full month of post drafts — you tweak, approve, and schedule. The blank calendar problem disappears.

WHAT YOU NEED

A short brief about your business — what you do, who your customers are, your tone.

THE PROMPT

COPY THIS PROMPT

I need a month of social media post ideas for my business. Here's the brief: Business: [e.g. a plumbing company in Brisbane]. Customers: [e.g. homeowners, aged 35-65, value reliability and fair pricing]. Tone: [e.g. friendly, practical, no jargon]. Please write 20 post drafts. Mix of tips, behind-the-scenes, client results, and promotional. Keep each post under 150 words. Include a call to action on every third post.

TIPS

- Save the brief somewhere — reuse it every month with just a few tweaks.
- Ask Claude to "write 5 more in the same style" if you want to build a bigger library.
- For image ideas, ask: "What photo or graphic would work best with each of these posts?"

THE WIN:

Go from empty calendar to a month of content in one sitting.

Clean up a spreadsheet

Est. 60 seconds

WHY THIS MATTERS

Messy data — inconsistent formatting, duplicates, mixed-up columns — is one of those jobs that's both tedious and error-prone when done by hand. Claude can tell you exactly what to do, or Microsoft Copilot can do it directly inside Excel.

WHAT YOU NEED

A description of the problem, or paste the messy data directly into Claude.

THE PROMPT

COPY THIS PROMPT

I have a spreadsheet with the following problem: [describe the issue — e.g. "client names are inconsistently formatted — some are UPPERCASE, some are Title Case, some have extra spaces"]. Here is a sample of the data: [paste 10-15 rows]. Please tell me exactly how to fix this in Excel, step by step. If there's a formula I can use, include it.

TIPS

- If you have Microsoft 365, try Copilot in Excel directly — highlight the messy column and describe the fix.
- For deduplication: paste a sample and ask "how do I remove duplicate rows in Excel based on column A?"
- Claude can also write Excel formulas for you — just describe what you want to calculate.

THE WIN:

Fix in 60 seconds what used to take an hour of careful manual work.



WHAT'S NEXT

You've started. Now go further.

1

Keep experimenting

Try each of the five prompts this week. Adapt them to your business. The more context you give Claude, the better the output gets.

2

Build your prompt library

When a prompt works well, save it somewhere your whole team can access — a shared doc, a Notion page, anywhere. Consistency is where the time savings compound.

3

Talk to Wolfari when you're ready to go further

If you want AI properly integrated into your workflows — not just occasional prompts, but AI built around how your business actually operates — that's what we do.

Book a free 30-minute session with Wolfari

wolfari.com.au · hello@wolfari.com.au