

CAREER PROTOCOL



WORKFLOWS

10 AI Workflows Every Office Employee
Should Learn Before 2027

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INTRODUCTION

The Quiet Shift Already Happening at Work

Something is changing at your office.

Maybe you've noticed it. Maybe you haven't. But it's there.

A coworker finishes their status report in eight minutes instead of forty. Someone on your team starts producing cleaner documentation with less effort than before. A colleague who used to struggle with email phrasing suddenly sounds more confident in writing.

Nobody is announcing it. Nobody is holding workshops. But something is shifting quietly underneath the surface of normal workdays.

Some people have started using AI tools to handle the parts of their job that used to drain time without adding much value. And it's not complicated. They're not engineers. They didn't take a course. They just started experimenting, found a few things that worked, and kept using them.

That's it.

This book exists because that gap, between people who have found simple AI workflows that help them and people who haven't, is about to matter a lot more than it does today.

Let's be honest about something first.

The news around AI can feel overwhelming. Between the headlines about job displacement, the LinkedIn posts from people who seem to have figured everything out, and the constant stream of new tools launching every other week, it's easy to feel like you're already behind.

You're not behind.

What you are is busy. You have an actual job. You have meetings and deadlines and emails and tasks that need to get done regardless of what's happening in the technology world. You don't have time to become an AI expert.

The good news is that you don't need to.

What you need is a small set of practical workflows that fit into your actual workday and save you real time on real tasks. That's what this book is about. Not theory. Not the future. Not what AI might do in five years.

What AI can do for you this week, during a regular Tuesday.

I want to be clear about something before we go any further.

AI is not going to replace you because it exists.

But it may create distance between you and people who learn to use it well. Not because those people are smarter or more technical. But because they found a few workflows that work and started using them consistently.

That's the quiet shift happening right now.

This book is your way in. No panic required. No technical background required. Just a willingness to sit down and try one thing at a time.

By the end, you'll have ten practical tools you can start using immediately. Some will save you ten minutes. Some will save you an hour. A few will make you look noticeably sharper to the people around you, without them knowing why.

That's enough.

Let's get into it.

Why Workflows Beat Random AI Experiments

Most people who try AI tools and give up do so for the same reason.

They open ChatGPT, stare at a blank box, and have no idea what to type.

They write something vague. The result comes back mediocre. They close the tab and conclude that AI isn't that useful.

What they experienced wasn't a problem with AI. It was a missing workflow.

A workflow is just a repeatable process. It's the same task, done the same way, producing a reliable result. When you have a workflow, you don't start from zero every time. You have a structure. You have a prompt that works. You know what to paste in, what to ask for, and what to do with what comes back.

That's the difference between someone who gets consistent value from AI tools and someone who gives up after the first frustrating attempt.

This book gives you ten workflows. Each one is tied to a real task that probably exists in your current job. Each one includes a copy-and-paste prompt you can use immediately.

You don't have to build anything from scratch. You just have to follow the steps.

A Note Before You Start

You do not need to be technical to use any workflow in this book.

You do not need to understand how AI works.

You do not need to buy a new tool. Every workflow here can be done using ChatGPT (free), Claude (free), or similar tools that are already available right now.

You will need:

- A free account on ChatGPT or Claude (takes about two minutes to create)
- The prompts in this book
- Real content from your actual job to paste in

That's it.

Start with one workflow. The one that sounds most like a problem you had this week. Try it. If it helps, try the next one. There's no deadline. There's no test at the end.

There's just your workday getting a little easier, one workflow at a time.

WORKFLOW
01

The Email Triage System

Stop letting your inbox run your day

THE PROBLEM

You start the morning planning to get something important done.

Then you check email.

Forty-five minutes later, you've replied to some things, starred a few others, deleted a few, and answered three that probably didn't need your attention at all. The thing you planned to do is still untouched. You feel scattered before 10 AM.

Your inbox is not organized by importance. It's organized by whoever sent something most recently. Which means the loudest, most recent senders get your attention first, regardless of whether their request is actually urgent, important, or something you need to handle at all.

Most people manage email reactively. They open it, scan it, respond to what feels pressing, and repeat until exhausted. There's no system. There's no filter. Just an ongoing flood with no end.

If this sounds like your morning, this workflow is for you.

WHAT THIS WORKFLOW DOES

This workflow helps you process a batch of emails faster by using AI to help you categorize, prioritize, and draft responses, without spending mental energy on every single message.

Instead of reading each email cold and deciding in the moment what to do, you paste your inbox summary into AI and ask it to help you sort, prioritize, and draft. You get a clear view of what actually needs your attention today, what can wait, and what doesn't need a response at all.

The result: you spend thirty minutes on email instead of ninety, and you spend that time on the right messages.

REAL-WORLD EXAMPLE

Marcus is an operations coordinator. He manages vendor relationships, internal requests, and project timelines across three departments. On a normal morning, he receives between thirty and sixty emails.

Before this workflow, Marcus spent the first hour of every day in his inbox, often losing track of which fires were actual emergencies and which were just loud. He frequently missed lower-priority emails that were actually more important than they seemed.

After using the Email Triage System, Marcus pastes a summary of his inbox subjects and senders into Claude once a day. He asks it to help him prioritize, flag anything time-sensitive, and draft responses for the three most common types of requests he receives.

He now handles email in about twenty-five minutes. The rest of his morning is protected for actual work.

THE AI WORKFLOW

1. Open your inbox. Don't respond to anything yet.
2. Copy the subject lines and sender names from your last twenty to thirty unread emails. You don't need to copy the full email body, just enough context to describe each one. (Example: "From: Sarah M, Project timeline update request." "From: IT Help Desk, Password expiration notice.")
3. Open ChatGPT or Claude.
4. Paste your list and use the prompt below.
5. Review the AI's categorization. Adjust anything it got wrong.
6. For emails that need a response, either use the AI-drafted replies directly or use them as a starting point.
7. Work through your inbox in priority order, not arrival order.

COPY-AND-PASTE PROMPT

I'm going to paste a list of emails from my inbox this morning. I need you to help me triage them.

For each email, please:

1. Categorize it as: Urgent (needs response today), Important (needs response this week), Low priority (can wait or delegate), or No action needed (informational only or can be deleted)
2. Give me a one-sentence explanation of why you categorized it that way
3. If it's urgent or important, draft a brief, professional reply I can use or customize

My role is [insert your job title]. I work in [insert your department or industry].

Here are my emails:

[paste your email subject lines, senders, and any brief context]

Please organize your response by priority category, starting with Urgent.

WHY THIS MAKES YOU MORE VALUABLE

Managing your inbox well isn't just about personal productivity. It's about how you show up to the people around you.

When you respond to the right emails faster, you become someone people can rely on. When you stop dropping things that fall below your radar, you become more dependable. When your replies are clear and professional even under volume, you look composed.

None of that requires you to work harder. It requires you to work with a better system.

The people who manage communication well tend to be trusted with more responsibility over time. Not because they're the fastest typists. But because they're reliable. AI-assisted email triage makes reliability easier to maintain, even on the high-volume days.

QUICK WIN CHALLENGE

Right now, or before the end of today, try this:

Copy the last fifteen subject lines in your inbox. Paste them into ChatGPT or Claude. Ask it to tell you which three are most urgent and why.

That's it. You don't have to use the output perfectly. You just have to see what comes back.

Most people are surprised by how clearly it helps them see what they were already sensing, but hadn't had time to think through.

WORKFLOW
02

The Meeting-to-Action Converter

Turn chaotic meeting notes into clean next steps

THE PROBLEM

The meeting ended thirty minutes ago.

You have a page of rough notes, half sentences, a few names next to tasks, maybe three question marks where someone said something important but you weren't sure what they meant by it. You know there were action items. You're not sure who owns which ones. You're not certain when anything is due.

You also have four other things waiting for you after the meeting. So the notes sit there, vaguely promising to be cleaned up later. Later turns into tomorrow. Tomorrow turns into next week. And now nobody can remember who agreed to do what.

This is how good meetings produce bad outcomes.

The problem isn't the meeting. It's the translation layer between what happened in the room and what everyone does when they leave it.

WHAT THIS WORKFLOW DOES

This workflow takes your rough meeting notes, even disorganized, fragmented ones, and turns them into a clean summary with clear action items, owners, and deadlines.

You don't need to take perfect notes during the meeting. You just need enough raw material to paste in afterward. AI handles the translation. What comes out is structured, professional, and ready to share with your team.

This workflow saves time, prevents dropped balls, and positions you as the person who brings clarity after conversations.

REAL-WORLD EXAMPLE

Diane is an HR coordinator at a mid-size company. She attends four to six meetings a week across different departments and is frequently the person responsible for distributing meeting notes.

Before this workflow, Diane spent thirty to forty-five minutes after each meeting trying to turn her handwritten notes into something readable enough to send out. She often wasn't confident the action items were

complete or accurate.

Now, Diane takes loose notes during the meeting as usual. Immediately after, she pastes them into Claude. Within two minutes, she has a clean summary, a bulleted list of action items with assigned owners and due dates, and a decisions-made section.

She sends it out faster than she used to start writing it.

THE AI WORKFLOW

1. During the meeting, take notes as you normally would. Don't worry about formatting. Focus on capturing names, tasks, timelines, and decisions, even if they're incomplete.
2. As soon as the meeting ends, open ChatGPT or Claude.
3. Paste your raw notes directly into the chat.
4. Use the prompt below.
5. Review the output. Add anything the AI missed. Correct anything it misinterpreted.
6. Copy the clean version and send it to your team or store it in your project management tool.

COPY-AND-PASTE PROMPT

I just finished a meeting and I need help turning my rough notes into a clean, professional summary.

Please organize the output into these sections:

1. Meeting Summary (2-4 sentences describing what the meeting was about and what was accomplished)
2. Key Decisions Made (bulleted list)
3. Action Items (list each item with: Task, Owner, Due Date, using what's in my notes. If no deadline was mentioned, write "TBD")
4. Open Questions (anything that came up but wasn't resolved)

Keep the tone professional but straightforward. Don't add information that isn't in my notes.

Here are my raw meeting notes:

[paste your notes here]

WHY THIS MAKES YOU MORE VALUABLE

Meetings are expensive. When ten people spend an hour together, that's ten hours of combined time. When nothing actionable comes out of that meeting, or when the action items get muddled and dropped, that time produced nothing.

The person who consistently brings clarity after meetings is quietly providing enormous value to their organization. They're reducing confusion. They're preventing repeated conversations. They're making the organization function better with less friction.

That person is often noticed. Not always loudly. But over time, they become associated with how things actually get done.

This workflow makes it easy to be that person. Not by being more organized by nature. By having a system.

QUICK WIN CHALLENGE

After your next meeting, any meeting today or this week, copy your notes and paste them into ChatGPT or Claude using the prompt above.

Don't edit the output. Just send it to one person who was in the meeting and ask if it looks accurate.

See what they say. That feedback is immediate proof of whether this workflow is working.

The Status Update Machine

WORKFLOW
03

Write professional updates in under three minutes

THE PROBLEM

Every week, sometimes more, someone needs a status update.

Your manager wants to know where the project stands. Leadership needs a report on progress. A client is asking what's been accomplished this week. A cross-functional partner needs to know if their dependencies are on track.

And every time, you sit down to write it and spend twenty minutes staring at a blank page, trying to figure out how to make a week of scattered activity sound organized and coherent.

You know what happened. You were there. But turning "I did a lot of stuff and there are still some problems" into a clean, professional update that sounds confident and structured is harder than it should be.

So you either write something that feels too thin, write something that feels too long, or delay it until it's overdue.

WHAT THIS WORKFLOW DOES

This workflow turns your loose bullet points, or even a stream-of-consciousness brain dump, into a clean, professional status update ready to send.

You don't need to know how to structure it. You don't need to spend time making it sound polished. You give AI the raw information about what you accomplished, what's in progress, and what's stuck. It organizes and formats it into something that communicates clearly.

This workflow is particularly useful for people who struggle with written communication or who simply don't have time to craft updates carefully each week.

REAL-WORLD EXAMPLE

Carlos is a project coordinator managing an office renovation timeline for a corporate facilities team. He sends weekly updates to three different stakeholders, each of whom wants slightly different information.

Before this workflow, Carlos spent up to forty minutes each week writing three slightly different versions of the same update. He often put it off, which made his updates feel rushed and incomplete.

Now, Carlos spends five minutes on Monday morning writing a raw brain dump of everything that happened the previous week, incomplete sentences, bullet points, whatever comes out. He pastes that into Claude with the prompt below and gets three lightly adjusted versions back within minutes.

His stakeholders started commenting that his updates felt more organized. Nothing about the content changed. The structure did.

THE AI WORKFLOW

1. Before writing your update, do a quick brain dump. Spend three to five minutes writing down everything that happened this week related to the project or role. Don't organize it. Just get it out. Include: what got done, what's still in progress, what's blocked or delayed, what's coming up next week, any risks or concerns.
2. Open ChatGPT or Claude.
3. Paste your brain dump.
4. Use the prompt below, adjusting the audience and format to match your situation.
5. Review the output and add any missing context.
6. Send or post it.

COPY-AND-PASTE PROMPT

I need help writing a professional status update based on my rough notes below.

Please structure it using this format:

- This Week's Accomplishments (what was completed)
- In Progress (what is still being worked on and where it stands)
- Blockers or Risks (anything slowing progress or at risk)
- Next Steps (what happens next week)

The audience for this update is [your manager / leadership / a client, choose one].

Keep the tone professional but direct. Keep it concise, no longer than it needs to be. Don't add information I haven't mentioned.

Here are my rough notes:

[paste your brain dump here]

WHY THIS MAKES YOU MORE VALUABLE

Communication is a core job skill that most people undervalue until someone else does it better.

When your status updates are clear and consistent, you build trust with the people who read them. They stop wondering what's happening with your projects. They stop having to ask follow-up questions. They stop

worrying.

That feeling, that someone has it under control, is worth more than most people realize. It's how careers grow quietly. It's how you become someone leadership relies on.

This workflow doesn't write your updates for you. It translates your actual work into language that communicates clearly. The work is still yours. The credit is still yours. You're just removing the friction between doing the work and communicating it well.

QUICK WIN CHALLENGE

Write a five-minute brain dump of what you accomplished at work this week. Don't filter it. Don't edit it. Just write.

Then paste it into Claude or ChatGPT using the prompt above and ask for a clean status update.

Compare it to how you would have written it manually. Notice the difference.

Use the output, or don't. But notice how much faster it was.

The SOP Builder

WORKFLOW
04

Document what you do before someone else does it for you

THE PROBLEM

There are things you know how to do that nobody else in your organization fully understands.

Maybe it's the vendor reconciliation process. Maybe it's how the monthly reporting gets pulled together. Maybe it's the onboarding checklist for new hires, or the way a certain system needs to be updated each quarter.

You know it. You've been doing it for months or years. But if you were out sick for two weeks, nobody would know where to start.

That's a risk, for your organization and, quietly, for you.

Here's the irony: if nobody else can do what you do, it can feel like job security. But it's actually the opposite. Undocumented processes are organizational liabilities. And when AI and automation tools start replacing functions, the processes that are already documented are the easiest ones to hand off. The ones locked in someone's head get reinvented from scratch.

Documenting your own processes isn't just good for the team. It's a way of demonstrating that you understand what you do, that you can communicate it clearly, and that you're thinking at a systems level.

WHAT THIS WORKFLOW DOES

This workflow helps you turn your verbal knowledge, the stuff you just know how to do, into a clear, formatted Standard Operating Procedure (SOP) document.

You don't need to be a technical writer. You don't need a special tool. You just need to describe how you do something in plain language, and AI turns it into a structured document that anyone can follow.

REAL-WORLD EXAMPLE

Priya is an office administrator at a financial services firm. She manages the monthly client billing cycle, a process that involves four different systems, two approval steps, and several recurring edge cases she's learned to handle over three years.

The process had never been written down. It existed entirely in Priya's head and a few scattered email threads.

After using the SOP Builder, Priya spent twenty minutes narrating the process into her phone's voice memo app while walking through it step by step. She transcribed the recording using AI, then pasted it into Claude with the prompt below.

What came out was a clean, formatted SOP document she could share with her manager and store in the team's shared drive.

Two weeks later, when Priya needed to take unexpected time off, her backup followed the document without a problem.

THE AI WORKFLOW

1. Choose one process you know well that isn't documented anywhere.
2. Describe how you do it in your own words. You can type it, speak it and transcribe it, or even write it as rough bullet points. The goal is to get your knowledge out of your head and into text. Include: when and why this process happens, who is involved, what tools or systems are used, the steps in order, any edge cases or exceptions, what the final output or deliverable is.
3. Paste your description into ChatGPT or Claude.
4. Use the prompt below.
5. Review the output carefully. Add any missing steps. Correct anything that isn't accurate.
6. Save the SOP in a shared location, a team drive, a project management tool, or your own working documents folder.

COPY-AND-PASTE PROMPT

I'm going to describe a work process I do regularly, and I need you to turn it into a professional Standard Operating Procedure (SOP) document.

Please format it with these sections:

1. Process Name
2. Purpose (1-2 sentences: why this process exists)
3. Who This Applies To (which roles or people)
4. When This Process Occurs (frequency or trigger)
5. Tools and Systems Required
6. Step-by-Step Instructions (numbered, clear, specific)
7. Common Issues and How to Handle Them
8. Notes (anything else someone would need to know)

Keep the language simple and direct. Write it so that someone unfamiliar with the process could follow it without having to ask questions.

Here is my description of the process:

[paste your description here]

WHY THIS MAKES YOU MORE VALUABLE

There's a difference between being the only person who can do something and being the person who designed how it works.

The first is fragile. If you leave, get promoted, or need help, everything stops.

The second is powerful. You become the person who built the system. You become someone who thinks in processes, not just tasks. That's a different category of employee, and it's noticed.

SOP documentation also signals maturity. It says: I understand my role well enough to teach it to someone else. That's the kind of thinking that accelerates careers quietly, especially when leadership is looking for people who can manage others or take on more responsibility.

QUICK WIN CHALLENGE

Pick one process you do regularly that isn't written down anywhere.

Spend five minutes writing a rough description of how you do it, in plain, messy language. Don't edit yourself.

Paste it into the prompt above and see what comes back.

Even if you never share the document, you'll have a written record of your own expertise. That alone is worth something.

WORKFLOW
05

The Data Cleanup Translator

Turn messy spreadsheet notes into organized clarity

THE PROBLEM

The spreadsheet has been through seven people's hands.

Some columns have inconsistent formatting. Notes are stuck in random cells with no explanation. Dates are entered three different ways. Some rows have data in the wrong columns. There are colors with no legend. There are comments that reference conversations that happened six months ago.

Your job is to make sense of it and produce something usable.

This is a specific kind of cognitive drain that doesn't get enough attention. It's not technically hard. But it's tedious, slow, and mentally exhausting in a particular way, the way that comes from trying to hold too much incomplete information in your head at once.

Whether you work in operations, finance, HR, project management, or just about any corporate role, there's a version of this spreadsheet in your life.

WHAT THIS WORKFLOW DOES

This workflow helps you process messy, inconsistent, or confusing spreadsheet content faster by using AI to help you interpret notes, identify inconsistencies, suggest cleanup approaches, and turn scattered data into organized summaries.

AI can't directly access your spreadsheet files. But it can process the text and data you paste into it, which is often enough to dramatically speed up the interpretation and cleanup process.

REAL-WORLD EXAMPLE

Jordan is an operations analyst at a logistics company. Each month, a data file comes in from a third-party vendor, messy, inconsistently formatted, and full of internal shorthand notes that Jordan has to decode before the data can be used in any reporting.

Before this workflow, Jordan spent three to four hours on this cleanup task each month.

Now, Jordan copies the text content from the messiest sections of the file, pastes it into Claude, and asks it to interpret what the data likely means, flag inconsistencies, and suggest a cleaner format. The AI does the

detective work in seconds. Jordan spends the rest of the time verifying and applying the fixes, which takes about forty-five minutes.

THE AI WORKFLOW

1. Identify the section of your spreadsheet that is most confusing or inconsistent.
2. Copy the relevant content, column headers, row data, notes, and any labels, and paste it as plain text.
3. Open ChatGPT or Claude.
4. Paste the data and use the prompt below.
5. Review what the AI identifies. Correct any misinterpretations.
6. Use the AI's suggested structure to guide your manual cleanup, or ask it to reformat the data for you if the dataset is small enough.

COPY-AND-PASTE PROMPT

I'm going to paste some data from a messy spreadsheet I'm trying to clean up.
I need your help making sense of it.

Please:

1. Describe what you think this data is tracking and what each column likely means
2. Identify any obvious inconsistencies, formatting problems, or data quality issues
3. Suggest a cleaner structure or format for organizing this data
4. Flag any rows or entries that look like errors, duplicates, or outliers
5. If there are shorthand notes or abbreviations, make your best guess at what they mean based on context

Here is the data:

[paste your spreadsheet content here, column headers, data rows, and any notes]

WHY THIS MAKES YOU MORE VALUABLE

Speed is only part of the value here.

The bigger value is accuracy. When you're doing spreadsheet cleanup manually after hours of staring at inconsistent data, errors creep in. Not because you're careless, but because the human brain fatigues on repetitive, low-variety tasks.

AI doesn't fatigue. It catches things you'd miss at hour three because you'd already normalized the inconsistency without realizing it.

People who can process and clean data reliably, and do it faster than others, are valuable in almost every organizational function. Data cleanup isn't glamorous. But the downstream quality of decisions that get made from clean data is very real.

If you're the person who delivers clean, organized information consistently, you become someone people trust with important data. That trust compounds over time.

QUICK WIN CHALLENGE

Find a spreadsheet in your recent work that has at least one messy section, inconsistent notes, mixed formatting, or unclear column entries.

Copy ten to fifteen rows of it and paste them into Claude or ChatGPT using the prompt above.

Ask it to tell you what's wrong and suggest how to fix it.

You'll be surprised how quickly it identifies things you'd been mentally glossing over.

The Customer Response Library

WORKFLOW

06

Build a personal bank of professional replies

THE PROBLEM

You write roughly the same emails over and over.

Customer asks about a delayed order. Customer asks for a refund or exception. Client asks for a project update. Vendor asks about payment status. Someone asks a question you've answered forty times and will answer forty more.

Each time, you start from scratch. You open a blank email, try to remember how you worded it last time, and spend five to fifteen minutes writing something that sounds professional but not cold, informative but not too detailed, clear but not blunt.

Multiply that by the number of times per week you write this kind of response and you start to understand how much mental energy gets spent on something that could be systematized.

The other cost is inconsistency. When you write from scratch each time, your responses vary in tone, detail level, and professionalism, sometimes based on how tired or stressed you are. That inconsistency shows.

WHAT THIS WORKFLOW DOES

This workflow helps you build a personal library of professional response templates for the most common communications in your role.

Once built, these templates take the blank-page problem off the table. You pick the closest match, personalize it in sixty seconds, and send it. The thinking is already done.

REAL-WORLD EXAMPLE

Tamara is a customer service lead at an insurance firm. She handles a high volume of customer correspondence, claim inquiries, coverage questions, billing disputes, and appointment scheduling.

She estimated that about seventy percent of her emails fell into five to seven recurring categories.

Using this workflow, Tamara spent one afternoon creating ten email templates with AI, covering her most common scenarios. Each template was professional, clear, and on-brand for her organization.

She now spends thirty to sixty seconds personalizing a template instead of fifteen minutes writing from scratch. Her response volume went up. Her stress went down. Her manager noticed the improvement in response quality consistency.

THE AI WORKFLOW

1. Make a list of the five to ten most common types of emails or messages you write at work. Examples: declining a request, following up on an overdue item, explaining a delay, confirming a meeting, responding to a complaint.
2. Start with the one you write most often.
3. Open ChatGPT or Claude.
4. Describe the situation and what the response needs to accomplish.
5. Use the prompt below to generate your first template.
6. Review, adjust the tone to match your voice, and save it somewhere accessible, a notes app, a document, a draft folder.
7. Repeat for each scenario on your list over the course of a week.

COPY-AND-PASTE PROMPT

I need you to write a professional email template for a situation I deal with regularly at work.

Here's the context:

- My role: [your job title]
- Industry or context: [briefly describe your company or industry]
- The situation: [describe the type of email, e.g., "A customer is asking why their order hasn't arrived yet and I need to apologize and explain that it's delayed by about a week."]
- What the email needs to do: [acknowledge the issue / provide information / offer a next step / set expectations, choose what applies]
- Tone: Professional but warm. Not stiff or corporate. Not overly casual.

Please write the template with [BRACKET NOTES] in places where I'll need to personalize it each time (like the customer's name, specific dates, or details).

Make it clear and concise. No filler. No over-apologizing.

WHY THIS MAKES YOU MORE VALUABLE

Consistency in professional communication is a skill that compounds.

When every response you send sounds thoughtful and professional, even on a busy Wednesday when you have fifteen things happening, you build a reputation for reliability and clarity. People start to trust your communications because they've never been burned by one.

Templates don't make communication less human. They make the structure consistent so you can focus your energy on the personal parts, the specific name, the specific situation, the specific next step. That's where personality and care still live.

Building a template library also protects your organization. When responses go out inconsistently, especially in customer-facing roles, it creates liability and confusion. Consistent, well-crafted responses reduce both.

QUICK WIN CHALLENGE

Pick the email you write most often. It could be a weekly check-in, a follow-up reminder, a standard inquiry response, anything.

Describe it to Claude or ChatGPT using the prompt above.

Save the output somewhere easy to find.

The next time you need to write that email, try personalizing the template instead of starting from scratch. Notice the difference in how long it takes.

WORKFLOW
07

The Weekly Report Generator

Go from scattered notes to polished summary in minutes

THE PROBLEM

Every week, someone needs a report.

Maybe it's your manager. Maybe it's a leadership team. Maybe it's a client or a board. And every week, you collect data from different places, a project tool, a spreadsheet, your email, your memory, and try to stitch it together into something that looks organized and reads coherently.

The challenge isn't that you don't know what happened. It's that translating a week of scattered activity into a document that tells a clear story is surprisingly hard. What do you include? What do you leave out? How do you make it sound structured without burying the important parts?

Most people either write something too long, something too thin, or something that sounds like a list of tasks rather than a real summary of progress.

WHAT THIS WORKFLOW DOES

This workflow takes your raw notes, data points, and scattered updates from the week and turns them into a clean, professional report in a consistent format.

You feed it messy inputs. You get a polished output. And because you're using the same prompt structure every week, your reports start to have a consistent rhythm that becomes recognizable to the people who read them.

REAL-WORLD EXAMPLE

Anita is a program manager at a nonprofit. Each Friday, she sends a weekly progress report to three different stakeholders, each of whom is interested in slightly different aspects of the program.

Before this workflow, Anita spent two to three hours on Friday afternoons compiling, writing, and formatting reports. By the end, she was exhausted and often felt like the reports didn't fully capture the week's complexity.

Now, Anita keeps a running bullet-point list throughout the week of notable events, completions, issues, and upcoming items. On Friday afternoon, she pastes that list into Claude with the prompt below. In about fifteen minutes, including review and light editing, she has three slightly tailored reports ready to send.

She now leaves the office on Friday feeling like the week was wrapped up properly.

THE AI WORKFLOW

1. Throughout the week, keep a running list of notable items. This doesn't need to be formal, just a running note in your phone, a sticky note, a draft email to yourself. Capture: what got completed, what moved forward, what hit a snag, what's coming next.
2. At report time, open ChatGPT or Claude.
3. Paste your running list.
4. Use the prompt below.
5. Review the output. Add anything missing. Remove anything that shouldn't be included.
6. Adjust the tone or emphasis if needed based on your audience.
7. Send.

COPY-AND-PASTE PROMPT

I need to write a weekly progress report based on my rough notes from this week. Please turn these notes into a clean, professional report.

Use this structure:

1. Executive Summary (2-3 sentences: the overall state of things this week)
2. Completed This Week (what was finished or delivered)
3. In Progress (key work still ongoing and where it stands)
4. Issues or Risks (anything that's blocked, delayed, or needs attention)
5. Planned for Next Week (what's on the agenda)
6. Metrics or Key Numbers (include only if I've provided specific data)

The audience for this report is [describe your audience: manager, leadership team, client, etc.]. They care most about [describe what they value: progress against goals / risk and issues / budget and timeline / outcomes].

Keep the tone professional, clear, and direct. Avoid filler language. Keep it as concise as it can be while still being complete.

Here are my rough notes from the week:
[paste your notes here]

WHY THIS MAKES YOU MORE VALUABLE

Regular, well-structured reporting does something subtle but powerful: it makes your work visible.

This matters more than most people realize. A significant amount of career progress depends not just on the work you do, but on whether the right people understand and remember the work you do. Reporting is how

you close that gap.

When your reports are consistent and clear, decision-makers can track progress without having to ask questions. They trust the picture they're getting. And trust, in organizational settings, translates into opportunity.

The person who reports clearly and consistently is often the first person thought of when a new project needs a reliable lead.

QUICK WIN CHALLENGE

At the end of today or this week, spend five minutes writing a rough list of everything notable that happened at work.

Paste it into Claude or ChatGPT using the prompt above and ask for a weekly summary.

Even if you don't send the report to anyone, read it back to yourself. It's a surprising way to see how much you actually did in a week, and how clearly it can be communicated.

WORKFLOW
08

The Daily Prioritization Protocol

Start every morning knowing exactly what matters

THE PROBLEM

You sit down at your desk.

You have seventeen things that could technically be called priorities. Three of them are legitimately urgent. Four of them feel urgent but probably aren't. Two of them are important but not urgent, which means they'll get pushed to tomorrow, and then the next day, and eventually they'll become crises. The rest are things you need to get back to but haven't.

You don't have a clear plan. So you default to email, which feels productive but mostly just catches you up on other people's priorities instead of your own.

By 11 AM you've been busy for two hours but haven't moved the needle on anything that actually matters.

This is not a discipline problem. This is a structure problem. And the solution isn't willpower. It's a better starting routine.

WHAT THIS WORKFLOW DOES

This workflow helps you start each day with a clear, prioritized plan by using AI to help you sort your task list and identify the highest-value actions to focus on first.

You give AI your tasks, your deadlines, and any relevant context. It helps you think through what should happen when, and why. What comes back is a simple daily plan that removes the guesswork and decision fatigue from your morning.

REAL-WORLD EXAMPLE

Marcus starts each morning with about twelve to twenty items across two projects and his day-to-day responsibilities.

Before this workflow, Marcus would usually figure out what to work on by feel. Some days that worked fine. Other days he'd spend the morning on lower-priority tasks and then panic in the afternoon when something more important surfaced.

Now, Marcus spends five minutes every morning pasting his task list into Claude with the prompt below. He tells it what's due, what's stuck, and what he has time for that day. The AI gives him a prioritized order and a brief rationale for each decision.

He doesn't always follow it perfectly. But having the framework makes it far easier to start, and far less likely that important things slip through.

THE AI WORKFLOW

1. Each morning, spend three to five minutes writing your complete task list for the day. Include anything that's due, anything that's overdue, anything you've been meaning to do, and any meetings or fixed commitments.
2. Note any context that's relevant: what deadlines are real versus soft, what depends on other people, what you're waiting on, what your energy level is like.
3. Open ChatGPT or Claude.
4. Paste your list and use the prompt below.
5. Review the prioritized plan. Adjust based on anything AI might not know.
6. Start with the first item on the plan. Don't check email first.

COPY-AND-PASTE PROMPT

I need help prioritizing my tasks for today. I'm going to give you my complete task list along with some context.

Please:

1. Rank my tasks in the order I should work on them, from most to least important
2. Give a one-sentence reason for each priority ranking
3. Identify anything I should delegate, defer to another day, or let go of entirely
4. Flag any task that looks like it could block someone else if I don't do it first
5. Suggest a rough time block for the three most important tasks

Context about my day:

- Available focused work time: [hours]
- Fixed commitments (meetings, calls, etc.): [list them]
- Any deadlines today or tomorrow: [list them]
- Current stress level or energy: [high / medium / low]

Here is my full task list:

[paste your tasks here]

WHY THIS MAKES YOU MORE VALUABLE

Knowing what to work on, and doing it in the right order, is a form of judgment that organizations depend on.

People who manage their own priorities well require less supervision. They don't drop the important thing because the urgent thing got loud. They don't need to be reminded of what's coming. They have a system.

Systems-level thinking, even a simple daily prioritization habit, signals that you are someone who manages themselves and their work deliberately. That's a trait that becomes especially visible when things get complicated, when the workload increases, when something goes wrong.

The people who maintain clarity under pressure are the ones leadership reaches for first.

QUICK WIN CHALLENGE

Tomorrow morning, before you open your email, write down every task on your plate.

Paste it into Claude or ChatGPT and ask it to prioritize it for you using the prompt above.

Follow the plan for just the first two hours of your day.

Notice whether those two hours feel more productive than they usually do.

WORKFLOW
09

The Fast Research Summarizer

Get up to speed on anything without burning two hours

THE PROBLEM

Someone puts something on your plate that requires context you don't have.

A new vendor needs to be evaluated. A regulatory change affects your department. A client mentions their industry is going through something you're not familiar with. Your manager asks you to prepare talking points on a topic you haven't looked at in months.

In a perfect world, you'd have two hours to research and synthesize. But you have forty-five minutes before the meeting, or the brief is due this afternoon, and you need to understand enough to be functional, not expert-level, but not blank either.

The trap is either spending too much time reading too broadly or skimming so quickly that you don't absorb anything useful.

WHAT THIS WORKFLOW DOES

This workflow helps you get functional intelligence on any topic faster by using AI to summarize, synthesize, and translate complex or unfamiliar content into practical takeaways.

You can feed it articles, documents, policy text, reports, or just ask it to explain a topic you need to understand quickly. What comes back is a structured summary written for your specific level of familiarity and your specific need.

REAL-WORLD EXAMPLE

Selena is an executive assistant at a mid-size healthcare company. Her executive regularly asks her to prepare research briefs on topics that are outside her area of expertise, new regulations, competitive landscape summaries, vendor evaluations.

Before this workflow, Selena would spend an hour searching, reading, and trying to figure out what the most important information was. She often felt like she was producing something incomplete.

Now, Selena finds two to three articles or documents on the topic and pastes the key sections into Claude. She asks it to produce a brief in a specific format her executive prefers. In twenty to thirty minutes, she has a clean, organized brief that covers the essential points.

Her executive has commented multiple times on the improved quality of her research outputs.

THE AI WORKFLOW

1. Identify what you need to understand and why. Be specific: what decision will this information support? Who will see or use the output?
2. Gather your source material, articles, documents, meeting notes, reports, or any text you have access to.
3. Open ChatGPT or Claude.
4. Paste the key content from your sources.
5. Use the prompt below to get a structured summary.
6. Use the summary to prepare for your meeting, brief, or task.

COPY-AND-PASTE PROMPT

I need you to help me understand and summarize some information quickly.
I'm going to paste some source material and I need a structured summary
I can use to [prepare for a meeting / write a brief / answer questions /
make a recommendation, choose one].

Please organize your summary as follows:

1. What This Is About (2-3 sentence plain-language explanation of the core topic)
2. Key Facts I Need to Know (the most important points, in plain language)
3. What This Means for My Work (practical implications for someone in my role)
4. Questions I Should Be Ready to Answer (based on what you read, what might someone ask me about this?)
5. What I Still Don't Know (flag any important gaps in the information I gave you)

My role is [your job title] and I need to understand this for
[brief description of why you need it].

Keep explanations simple and clear. Assume I'm intelligent but not an expert
in this specific topic.

Here is my source material:
[paste articles, documents, or notes here]

WHY THIS MAKES YOU MORE VALUABLE

Speed of learning is a career advantage that compounds.

People who can get up to speed on unfamiliar topics quickly, and translate that into something actionable, can be deployed across more situations. They're useful in meetings they weren't originally central to. They

can speak to topics outside their specialty without looking unprepared. They can support leadership in situations that require broad awareness.

This workflow doesn't give you expertise. It gives you functional literacy, quickly. That's often exactly what's needed.

QUICK WIN CHALLENGE

Find a document, article, or report you've been meaning to read but haven't had time for.

Paste the key sections into Claude or ChatGPT using the prompt above.

Ask for a five-point summary.

See how much you can absorb in ten minutes versus what normally takes an hour.

The Self-Review Writer

WORKFLOW
10

Finally, a performance review you don't dread

THE PROBLEM

Performance review time arrives and you suddenly can't remember a single impressive thing you did this year.

You know you worked hard. You know you solved problems. You know there were moments where you went above and beyond. But when you sit down to write a self-evaluation, your mind goes blank and everything you remember sounds either too small to mention or too vague to sound meaningful.

So you write something safe and undersell yourself. Or you leave it until the last minute and submit something rushed that doesn't reflect the work you actually did.

Either way, you walk away from the process feeling like your contributions weren't fully represented, because they weren't.

This is not about confidence. It's about not having a system for tracking and translating your own work into clear, compelling language.

WHAT THIS WORKFLOW DOES

This workflow helps you write a professional, well-structured self-review by organizing what you've done throughout the year and translating it into language that communicates your value clearly.

You start with rough notes, memories, project names, things you're proud of, problems you solved. AI helps you shape that material into a review that's confident, specific, and professional.

REAL-WORLD EXAMPLE

Derek is a data entry coordinator at a logistics company. He'd been at the company for three years, consistently received good informal feedback from his manager, but had never written a self-review he felt good about.

His reviews were always generic. He wrote things like "I am a dedicated team player who works hard to meet deadlines." His manager kept telling him to be more specific, but Derek wasn't sure how.

Using this workflow, Derek spent twenty minutes writing a rough list of everything he remembered doing that year, projects, problems he solved, times he helped colleagues, process improvements he'd suggested, difficult periods he'd navigated. He also included specific numbers where he had them.

He pasted that list into Claude with the prompt below. What came back was a structured self-review that was specific, clear, and honest, without overstating anything.

His manager told him it was the strongest self-review he'd ever submitted. Nothing about what Derek had done changed. The way it was communicated did.

THE AI WORKFLOW

1. Before you write anything for the review, spend fifteen to twenty minutes doing a memory dump. Write down everything notable from the past year, projects, accomplishments, challenges, improvements, moments you helped someone, things you learned, times you stepped up. Include: projects you were part of or led, problems you solved, improvements you made to how something was done, times you went beyond your job description, difficult situations you navigated, feedback you received, skills you developed, numbers if you have them.
2. Don't filter. Don't judge. Just write it down.
3. Open ChatGPT or Claude.
4. Paste your memory dump.
5. Use the prompt below.
6. Review the draft carefully. Make sure everything in it is accurate. Remove anything that's overstated.
7. Adjust the tone to sound like you, not a template.

COPY-AND-PASTE PROMPT

I need help writing a professional self-performance review based on my rough notes about the past year.

Please write a self-review that:

1. Opens with a brief summary of my role and overall contributions (2-3 sentences)
2. Highlights my key accomplishments with specific language (based only on what I've given you, don't invent details)
3. Demonstrates my value to the team and organization in concrete terms
4. Acknowledges any areas I worked on or improved
5. Closes with a forward-looking statement about my goals for the coming year

Tone: Professional, confident, and honest. Not arrogant. Not self-deprecating. The goal is to communicate clearly and specifically, not to hype or oversell.

My role is [your job title]. I've been in this role for [length of time].

Here are my rough notes from the past year:

[paste your memory dump here]

WHY THIS MAKES YOU MORE VALUABLE

Self-advocacy is a professional skill.

If you can't describe what you do and why it matters, you're depending on others to notice, and in busy organizations, that's a gamble. The ability to communicate your own value, clearly and confidently, directly influences how you're perceived, how you're compensated, and where you go.

This isn't about bragging. It's about translation. You did the work. This workflow helps you communicate it in a way that lands.

And the habit of tracking your contributions year-round, so you're never caught flat-footed at review time, is one of the most underrated career strategies there is.

QUICK WIN CHALLENGE

Right now, spend ten minutes writing down five things you accomplished at work in the last ninety days.

Don't edit. Don't judge whether they're impressive enough. Just write.

Then paste those five things into Claude or ChatGPT and ask: "How would you describe these accomplishments in a professional performance review?"

Read what comes back. Notice what changes when the same information gets translated into clear, professional language.

That's the gap this workflow closes.

CONCLUSION

You Don't Have to Be First. You Just Can't Be Last.

There's a version of the next few years where you look back and see exactly when things shifted.

You'll remember that there was a period, right around now, when some people started quietly getting better at their jobs without working more hours. When certain professionals started delivering faster, communicating more clearly, and producing more consistent work without burning out harder.

You'll remember that most people watched that happen and waited to see how things played out.

And you'll remember which group you were in.

The good news, and I mean this, is that we're still early.

Early doesn't mean this is easy forever. But it means you still have time to get comfortable before it becomes mandatory. You still have time to try something, get it wrong, try again, and figure out what actually works for your specific job before the pressure is on.

That window matters. And it's smaller than it looks.

Let me be direct with you about what this book was and wasn't trying to do.

It wasn't trying to make you excited about AI. It wasn't trying to convince you that technology is going to save the world. It wasn't trying to sell you on a lifestyle or a platform or a personal brand.

It was trying to give you ten things you can actually use this week, at your actual job, to make your work easier and your output better.

That's it.

If you use even three of these workflows consistently, your workday will change. Not dramatically, not overnight. But steadily. You'll spend less mental energy on the parts of your job that drain you without adding much. You'll produce better written communication with less effort. You'll feel more organized. You'll have more capacity for the parts of your work that actually need your judgment, your experience, and your relationships.

Those are the parts AI can't replace.

Here's the honest truth about where we're heading.

The value of routine tasks, the kind that follow the same pattern every time, the kind that can be described in a list of steps, is declining. Not disappearing entirely, but declining. Organizations are going to start moving faster with fewer people in certain roles, and the roles that survive and grow will be the ones that require what AI still can't do well: context, relationships, judgment, accountability, creativity, and institutional knowledge.

The people who are positioned for that future are the ones who started using AI to clear the routine tasks off their plate, so they could spend more time doing the things that can't be automated.

That's not a threat. That's an opportunity.

You don't need to panic.

Panic won't help you. And the situation doesn't actually require it. What it requires is a calm, early adaptation, the kind that happens one workflow at a time, one small win at a time, one Tuesday afternoon experiment at a time.

That's all this is.

Ten workflows. Tried one at a time. Applied to the actual work in front of you.

The people who stay relevant and valuable over the next several years won't all be the most technical. They won't all be the youngest or the most connected or the most ambitious.

Some of them will just be the ones who found a few things that worked and kept using them consistently, long before everyone else felt the urgency to start.

You have a head start. Use it.

FINAL ENCOURAGEMENT

If you closed this book feeling even slightly more capable than when you opened it, that's the point.

You're not behind. You never were. You're just at the beginning of a learning curve that almost everyone around you is also at the beginning of, whether they know it yet or not.

The difference is that you're doing something about it.

You don't have to master all ten workflows today. Pick the one that sounded most like your actual Tuesday. Try the prompt. See what comes back. Adjust it. Try it again.

Build one habit before you build ten.

And as you go, remember what this is really about: becoming someone who shows up to their workday with better tools, clearer output, and more capacity for the things that matter.

Not an AI expert. Not a tech enthusiast.

Just someone who adapted a little earlier than most, and made their work life better because of it.

That's enough. That's more than enough.

Now go try something.

"The people who adapt calmly and early will have a major advantage. Not because they predicted the future correctly. Because they stopped waiting for permission to start."

WHAT'S NEXT IN THE CAREER PROTOCOL SERIES

If this book helped you, the Career Protocol series continues with deeper tools for professionals who are ready to build more advanced systems.

Career Protocol: Repetitive Work Edition

How to Use AI in Your Current Role Before You're Replaced

A guide for workers in high-repetition roles who want to protect their position and add value using AI.

Career Protocol: Workflow Builder

How to Build AI Systems That Work While You Do

For professionals ready to move beyond single prompts and build repeatable systems that run in the background.

Career Protocol: The Irreplaceable Employee

How to Become the Person AI Can't Replace

A deeper playbook for building the skills, reputation, and relationships that make you valuable in any AI-transformed environment.

Each book in this series was written for people who have real jobs and real workloads and don't have time to waste on abstract concepts.

They're practical. They're calm. They're built for now.

CAREER PROTOCOL™ is a series by Ricky Terry.

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