A FREE 5-DAY GUIDE FROM TAGGERUNG SOLUTIONS

Start using AI the right way

About fifteen minutes a day. No software to buy. Written for business owners, and the office staff who keep them running, who want to get AI set up properly before they bring anyone in.

1. Pick one AI tool and set it up properly
2. Brief it like a new hire on their first day
3. Build a small folder of notes about your business
4. Save the prompts that work, and check what it gives you
5. Hand off one weekly task

TAGGERUNG SOLUTIONS

Andrew Allen, Taggerung Solutions
Albany, Oregon · taggerungsolutions.com

BEFORE YOU START

Why I wrote this

A lot of owners I talk to have tried AI once or twice. They asked it to write an email, got something that sounded like a greeting card, and went back to doing it themselves.

The tool usually wasn't the problem. It was set up with the default settings, it was handed one line of instructions, and it knew nothing about the business. A new hire treated that way on their first day wouldn't do much better.

Not everyone is ready to bring in a company like ours, and that's fine. I'd rather you start well on your own than start badly. Everything in here works with whichever AI you choose, and none of it needs anything beyond a free account or a monthly subscription.

How to use this guide

- Do one day at a time. Each one ends with a short task labelled "Today's fifteen minutes."
- Use a real task from your own week every time. Practice on made-up examples doesn't stick.
- Day 3 takes the longest, and it's the one that pays off the most. Give it an extra half hour if you can.
- The template files mentioned on Day 3 come with this guide in a folder called AI Notes Starter. Copy that folder anywhere on your computer and start filling it in.

One idea runs through all five days

AI models leapfrog each other every few months. The one that's best at writing today may not be the best at images or spreadsheets next year, and the person doing your marketing may need a different tool than the person doing your books.

So everything here is built to move with you. Your notes live in plain files on your own computer. Your saved prompts work in any tool. If you switch from ChatGPT to Claude or Copilot next spring, you bring all of it along and lose nothing.

DAY 1 OF 5

Pick one AI tool and set it up properly

Pick one and stay with it for the week. ChatGPT, Claude, Microsoft Copilot and Google Gemini are all capable. The settings matter more than the brand.

Choosing

- If your company already runs on Microsoft 365, check whether Copilot Chat is already included with your accounts. For a lot of businesses it is.
- If more than one person will use it, look at the business or team plan. The major AI companies don't use business and team accounts to train their models by default.
- If you're starting on a personal account, that's fine for this week. Just do the next step before you type anything about your business.

Turn off training on your chats

On personal accounts, most AI tools are allowed to use your conversations to improve their models unless you turn that off. Open Settings, look under Data Controls or Privacy, and turn off the option that lets your chats be used to improve or train the model. The exact wording differs by app and changes now and then, so if you can't find it, search the tool's help pages for "data controls."

Decide what never gets pasted in

Even with training turned off, these don't belong in a chat window:

- Passwords, login codes and anything from your password manager
- Bank account, routing and card numbers
- Social Security numbers, driver's license numbers and tax IDs for employees or customers
- Payroll, medical or disciplinary details about anyone on your crew
- Anything a customer or GC gave you under a confidentiality agreement

Names, job addresses, scopes of work and your own pricing are usually fine to use on a business account. When you're unsure, swap the real name for "the homeowner" and the address for "the Lebanon job." The AI does just as well.

TODAY'S FIFTEEN MINUTES

Create the account, turn off training, and ask it one real question from this week. Something you'd normally look up or ask a friend about.

DAY 2 OF 5

Brief it like a new hire on their first day

You wouldn't hand a new office admin a sticky note that says "write a follow-up." They'd ask who it's for, what happened, and how you like things written. AI needs the same answers and won't ask unless you tell it to.

MOST PEOPLE TYPE

Write a follow-up email for an estimate.

WHAT GETS A USABLE DRAFT

I own a small deck and fence company in Albany, Oregon. A week ago I sent a homeowner in Lebanon an estimate for a 400 square foot composite deck and haven't heard back. Write a short follow-up email from me. Friendly, not pushy, under 100 words. Mention that our spring schedule is filling up and offer a 15 minute call to go over material options.

The four things every request needs

1. Who you are and what kind of business you run.
2. What you need it to make: an email, a list, a schedule, a summary.
3. What's going on: the job, the customer, what already happened.
4. What finished looks like: how long, what tone, what to include or leave out.

Make it ask you questions first

For anything bigger than an email, end your request with:

> `Before you write anything, ask me any questions you need answered to do this well.`

It'll ask things you hadn't thought of. Answer them and the first draft is usually close.

Then push back on it

Tell it what's wrong in plain words, like "Too formal. Make it sound like I'm talking to them in their driveway." It adjusts as many times as you need.

TODAY'S FIFTEEN MINUTES

Take one email you have to send this week. Write the request with all four parts, push back on the first draft once, and compare it to what you'd have written.

DAY 3 OF 5

Build a small folder of notes about your business

Yesterday you typed out who you are and what you do. Today you write it down once, in a file, so you never type it again.

What a .md file is

A file ending in .md is a Markdown file. It's plain text with a couple of simple marks: a line starting with # is a heading, and a line starting with a dash is a bullet. It opens in Notepad on Windows or TextEdit on a Mac. Every AI tool reads it cleanly, and it'll still open in twenty years.

Why it matters

Your business notes live on your computer, in a folder you own, and they don't belong to any AI company. Attach the same file to ChatGPT today and Copilot next year and you get the same head start in both. This is the same idea we build for businesses at a bigger scale: keep what the AI needs to know in one place you control, and let the AI on top change.

The folder

```
Documents/
  AI Notes/
    00-about-my-business.md      who you are, where you work, how you talk
    01-how-we-write.md           three real emails that sound like you
    02-services-and-pricing.md   what you sell and how you price it
    03-customers-we-want.md      the jobs you want more of, and the ones you turn down
    prompts/
      estimate-follow-up.md
      job-recap.md
      review-reply.md
    jobs/
      2026-lebanon-deck/
        notes.md                 scope, changes, what was promised
```

The numbers at the front keep the main files in order. Start with 00 today and fill in the others over the next few weeks. The AI Notes Starter folder that came with this guide has every one of these files already made, ready to fill in.

Keep the folder somewhere that's backed up, like OneDrive or Google Drive. Day 1's never-paste list applies here too.

DAY 3 OF 5, CONTINUED

Making the file, and what goes in it

Making the file

- Windows: open Notepad, type your notes, choose File, then Save As. Set “Save as type” to All files and name it 00-about-my-business.md.
- Mac: open TextEdit, choose Format, then Make Plain Text. Save it as 00-about-my-business.md, and when it asks, choose Use .md.

Here’s the 00-about-my-business.md template from the starter folder. Fill in what you can in fifteen minutes. A half-finished file still beats starting every chat from nothing.

```
# About my business

## Who we are
- Company name:
- What we do:
- Where we work: (towns, how far we drive)
- Size: (owner, office, field crews)
- License: (CCB number, insurance)

## Who we work for
- Typical customer:
- Jobs we want more of:
- Jobs we turn down, and why:

## How we talk
- Tone: (plain, friendly, formal?)
- Phrases we use:
- Phrases we never use:

## Things the AI should always know
- Payment terms:
- Our busy season:
- How far out we're booking:
```

Using it

Start a new chat, attach the file with the paperclip or plus button, then ask your question. You’ll see the difference in the first answer.

Most tools also have a Projects feature that loads your notes into every chat. Use it, but keep the master copy in your folder and update it there first.

TODAY’S FIFTEEN MINUTES (GIVE IT THIRTY IF YOU CAN)

Make the AI Notes folder, fill in 00-about-my-business.md, then attach it to a chat and redo yesterday’s email request. Compare the two drafts.

DAY 4 OF 5

Save the prompts that work, and check what it gives you

When a request gets you a good result, don't let it disappear into your chat history. Save it in the prompts folder with blanks where the details change.

The job-recap.md template turns a voice memo from the job site into an update for the customer:

```
# Job recap for the customer

Here's a transcript of my voice memo from the [job name] job today.
Turn it into a short update for [customer name].

- What got done today
- What's happening next, and when
- Anything we need from them (decisions, access, payments)

Keep it under 120 words. Plain and friendly.
Don't add anything I didn't say. If something is unclear, ask me.
```

Record the memo on your phone on the drive home, paste the transcript in, and the update is ready to send. The last line matters. It tells the AI to ask instead of filling gaps on its own.

Check everything it gives you

> AI writes a wrong number in the same confident tone as a right one.

Before anything goes to a customer, read it line by line and check:

- Numbers: prices, quantities, square footage, dates, times
- Names: people, streets, products, suppliers
- Anything about code, permits, law or taxes. Look those up yourself.
- Promises: make sure it didn't commit you to a date or a price you never gave it

TODAY'S FIFTEEN MINUTES

Save the best request from Day 2 as a file in your prompts folder, with blanks for the details. Then use one saved prompt on a real task and check the result line by line.

DAY 5 OF 5

Hand off one weekly task

Pick one thing you do every week that follows the same pattern, and that you'd check before it goes out anyway. That's your first real handoff.

Good first tasks

- A Friday recap of every open job, written from your notes and voice memos
- Follow-ups on estimates that went out more than a week ago
- Replies to Google reviews, good and bad
- Turning meeting or site-walk notes into a to-do list with names on it

Save the prompt and put a reminder on your calendar for the same time every week. After a month you'll know what it saves you.

Signs you've outgrown copy and paste

Everything in this guide runs on you carrying information to the AI by hand. These are the signs it's time for more:

- You export the same report from your accounting or scheduling software every week just to paste it in.
- You want to ask "who still owes us money?" and get an answer from your real books instead of a guess.
- Three people in the office are using three different AI tools, with no rules about what goes in them.
- You want the AI to draft the reminders and queue them up for your OK, not just help with the wording.

That's the point where the AI needs a real connection to your systems, with rules about what it can see and what it can do. It's the work we do in our AI and Automation service. We connect your accounting, scheduling, email and phones to one backbone we build and host, any AI model plugs into it, and nothing sends, pays or deletes without a person approving it. Your AI Notes folder carries straight over.

TODAY'S FIFTEEN MINUTES

Pick your one weekly task, write and save the prompt, and put the reminder on your calendar.

YOUR FIVE DAYS

The checklist

- [ ] Day 1. One AI tool picked, training turned off, never-paste list written down.
- [ ] Day 2. One real email written with all four parts, and pushed back on at least once.
- [ ] Day 3. AI Notes folder made, 00-about-my-business.md filled in and tested.
- [ ] Day 4. First prompt saved with blanks. One result checked line by line.
- [ ] Day 5. One weekly task picked, prompt saved, calendar reminder set.

After the five days

Add to your notes folder whenever you catch yourself typing the same background twice. Save every prompt that works. Once a month, open 00-about-my-business.md and update anything that changed, like your booking lead time or your service area.

If a better AI tool comes out, try it with your folder attached. You'll know within a day whether it's worth switching, and switching costs you nothing.

I have this conversation with owners around the Willamette Valley most weeks. If you want thirty minutes to look at how AI could be working in your business, I'm in Albany and I'll drive out to your shop. You'll be talking to me, and we'll work from whatever you've already got running.

Andrew Allen, Taggerung Solutions
(541) 702-8607 · taggerungsolutions.com/services/ai-automation