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TRUST FORWARD

The AI Sales & Marketing Workbook

Turn the trust you already have into a revenue line.

A step-by-step training manual. Four tools. Five documents. One strategy and a 90-day plan you build yourself.

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What You'll Build

By the end of this workbook you will have five real documents — not notes, not ideas. Files you can open, hand to your team, and act on.

- **1 · Your Strategic Dossier — your value proposition, ICP, differentiators, and SWOT, in your words.**
- **2 · Deep Market Research — where the opportunity actually is inside the clients you already serve.**
- **3 · Your Strategy & 90-Day Plan — which clients to approach, in what order, what to say, what to charge.**
- **4 · A Team Methodology — one page plus an audio overview your team can actually follow.**
- **5 · Drafted Outreach & a Follow-Up Cadence — already written, already scheduled.**

> **HOW LONG THIS TAKES**
>
> Roughly 90 minutes if you do it in one sitting. You can also do it in four sittings of about 20 minutes each — the workbook is built to stop and restart between steps.
>
> You do not need to be technical. If you can copy, paste, and answer questions about your own business, you can do all of this.

The One Idea That Makes This Work

Most people use AI one question at a time. Ask, get an answer, start over. That is why it feels like a toy.

This workbook does something different: each tool writes the prompt for the next tool.

ChatGPT builds your dossier — and then writes your research prompt for Gemini. Gemini does the research — and then writes your planning prompt for Claude. You are never staring at a blank box wondering what to ask. The work compounds.

> **THE CHAIN, IN ONE LINE**
>
> ChatGPT → builds your dossier + writes the Gemini prompt
>
> Gemini → does deep market research + writes the Claude prompt
>
> Claude → builds your strategy and 90-day plan
>
> NotebookLM → turns it into something your team can follow
>
> ChatGPT + Astra → drafts the outreach and schedules the follow-up

One more thing before you start: keep every document you generate. You will feed them forward. Make a folder called "AI Revenue Plan" right now and save everything into it.

Before You Begin

The four tools

All four have free tiers that will complete this workbook. Paid tiers give you longer documents and faster responses.

- **ChatGPT** — https://chatgpt.com
- **Google Gemini** — https://gemini.google.com
- **Claude** — https://claude.ai
- **NotebookLM** — https://notebooklm.google.com

Set up first — five minutes

1. Create an account on each of the four tools above, or sign in if you already have one.
2. Make a folder on your computer called "AI Revenue Plan." Every document you generate goes here.
3. If you have used ChatGPT before, use that same account. It already knows things about you and your business, and Step 1 takes advantage of that.
4. Block 90 minutes, or four blocks of 20. Close your email.

> **A NOTE ON WHAT YOU SHARE**
>
> You will be describing your business to these tools. Keep real client names, real contact details, and confidential client data out of it. Say "a law firm client" or "an accounting practice," not the firm's actual name.
>
> You do not need real client names for any step in this workbook. Everything works with categories.

Step 1 — Get It Out of Your Head

TOOL: ChatGPT · chatgpt.com · about 20 minutes

What you're doing: turning everything you know about your business — the stuff that lives in your head and nowhere else — into a written Strategic Dossier. And getting your research prompt written for you.

1A · START THE CONVERSATION

Open ChatGPT. Start a new chat. Type this, changing the details to match your business:

PROMPT 1 — TYPE THIS

```
I run a [SIZE]-person managed services provider in [REGION].
About [NUMBER] clients — [CLIENT TYPES, e.g. law firms, accounting
practices, medical offices].
Average relationship is [NUMBER] years. They call me before they
call anyone else.

My clients are starting to ask me about AI and I want to build a real
revenue line around guiding them through it — not a one-off project.

Before you write anything: interview me. Ask me the questions you
need in order to understand why these clients would buy AI guidance
from ME and not from a consulting firm. Ask one at a time.
```

1B · MAKE IT DO THE WORK FOR YOU

It will start asking you questions. Rather than answering all of them one at a time, use this shortcut. Paste it in next:

PROMPT 2 — THE SHORTCUT

```
Great questions. Before I answer these, I think you already have
pretty deep knowledge about me, my MSP, my ICP, value propositions,
SWOT and differentiators.

Please take everything you know about me and answer these questions
yourself. Then come back with 3 gap-filling questions so we can get
this done quickly before my next meeting.
```

WHY THIS WORKS

You just turned twelve questions into three. The model drafts its own answers from what it already knows, and only asks you about the genuine gaps.

Read what it drafted carefully. Where it got you wrong, correct it — those corrections are the most valuable thing in this whole step.

1C · ANSWER THE THREE QUESTIONS

Answer the three gap-filling questions in your own words. Be specific and be honest. If a client stayed with you through something hard, say what it was. If you have lost deals to a bigger firm, say so.

1D · BUILD THE DOSSIER AND THE NEXT PROMPT

Now ask for both deliverables at once:

PROMPT 3 — THE DELIVERABLE

```
Please create a comprehensive dossier that outlines my MSP, my ICP,
value propositions, SWOT and differentiators.

Then give me a prompt to put into Google Gemini to do deep research
and uncover more than enough research to validate costly assumptions,
avoid blind spots, and find a blue ocean opportunity in the markets
I am already in or in adjacent markets.

Separate the dossier into a downloadable document, and give me the
prompt as text I can copy and paste that references the uploaded
dossier.
```

SAVE TWO THINGS BEFORE YOU LEAVE THIS STEP

1 · Your Strategic Dossier — download it and save it to your folder.

2 · The Gemini prompt — copy it into a separate document and save that too.

You will need both in the next step. Do not skip this.

CHECKPOINT

Read your dossier. Does it describe a business you recognize? Does it lead with your relationships rather than your service list? If it reads generic, go back and tell ChatGPT what is missing, then regenerate.

This document is the foundation for everything after it. Spend the extra five minutes.

Step 2 — Find Where the Trust Converts

TOOL: Google Gemini · gemini.google.com · about 15 minutes

What you're doing: deep market research — not on a new market, but on the one you already serve. Where is the pressure? What would they actually pay to solve?

2A · UPLOAD AND RUN THE PROMPT YOU WERE GIVEN

1. Open Gemini and start a new chat.
2. Attach your Strategic Dossier from Step 1.
3. Attach the Gemini prompt document, or paste the prompt text directly.
4. Send this along with the attachments:

PROMPT 4 — TYPE THIS

```
Please see the attached Strategic Brand Dossier for my company,
and the attached Google Gemini research prompt.

Run that research now.
```

Turn on Deep Research if your version of Gemini offers it. It takes longer and the result is substantially better.

2B · WHAT A GOOD RESULT LOOKS LIKE

- Two or three client segments ranked by how urgent their problem is — not by how big the market is.
- A specific, named pressure for each one: compliance exposure, client expectations, a competitive threat.
- A realistic range for what a business that size can actually spend.
- It should read like it was written about your clients. Because it was.

2C · GET YOUR NEXT PROMPT WRITTEN

Before you leave Gemini, have it write the prompt for the next tool:

PROMPT 5 — HAND OFF TO CLAUDE

```
Now please create a prompt I can use in Claude to help me build a
realistic plan for my team to tackle this research and this market.
```

SAVE TWO THINGS AGAIN

1 · The market research — export or copy it into a document.

2 · The Claude prompt — save it separately. Name it "Claude Prompt — Read Me First" so it is obvious in the next step.

Step 3 — Build the Plan

TOOL: Claude · claude.ai · about 25 minutes

What you're doing: turning research into a strategy and a 90-day plan that fits the business you actually run — not a business with unlimited time and staff.

3A · FEED IN ALL THREE DOCUMENTS

1. Open Claude and start a new chat.
2. Attach all three documents: the Claude prompt, the Gemini research, and your Strategic Dossier.
3. Send this:

PROMPT 6 — TYPE THIS

```
Please see the attached documents:
  1. Claude Prompt – Read Me First
  2. Market Research from Gemini for my MSP
  3. My MSP's Strategic Dossier
```

3B · THE MOST IMPORTANT STEP IN THE WORKBOOK

What comes back will be good — and almost certainly too big. That is expected. Now you tell it the truth about your life:

PROMPT 7 — THE REALITY CHECK

```
This is great and SUPER OVERWHELMING. I don't have the team or the
time to execute this plan. We need to modify it to fit the reality
of our business and my life.

Here are the constraints, and I need you to respect them:
  · I'm the CEO. I am also the best salesperson in the company.
  · I have about TWO hours a week for sales and marketing. That's real.
  · My team is technically strong and trusted, but can't sell or
    explain AI.
  · I am not hiring before this generates revenue.

Build me a strategy and a 90-day plan. Tell me which clients to
approach first and why, what to say, what to charge, and what my
team does versus what only I can do.
```

DO NOT SKIP THIS

Change the numbers to your real ones. If it is two hours a week, say two. If it is forty-five minutes, say forty-five.

The constraint is what makes the plan real. Generic plans fail because they quietly assume resources you do not have. Tell it the truth and it builds for the business you actually run.

3C · WHAT YOU SHOULD GET BACK

- A named first cohort — which clients to approach, in what order, and why.
- Week-by-week actions that genuinely fit inside the hours you said you have.

- A clear split between what your team can carry and what only you can do.
- Pricing that matches what Step 2 said those clients can actually spend.

If any of those four are missing, say so and ask for them specifically. Keep pushing until the plan fits your week.

> **SAVE THIS**
>
> Your Strategy & 90-Day Plan. This is the document the whole workbook was built to produce.

Step 4 — Make It Real for Your Team

TOOL: NotebookLM · notebooklm.google.com · about 10 minutes

What you're doing: getting the plan out of your head and into your team's. A strategy your team cannot repeat is not a strategy — it is a document.

4A · CREATE THE NOTEBOOK

1. Open NotebookLM and create a new notebook.
2. Upload all three documents as sources: your Strategic Dossier, the market research, and the 90-day plan.
3. Confirm all three appear in the sources list.
4. Then ask for this:

PROMPT 8 — TYPE THIS

```
Create a one-page methodology my team can follow, and an audio
overview they can listen to on the drive in. Plain language.
No jargon.

Make the first 30 seconds powerful, data-backed and inspiring so
they are motivated to listen to the whole 5-minute summary.

They are technically strong but they have never sold AI guidance
before. Some of my team feels like AI will replace their value to
our organization and our clients — and I need you to address that
directly.
```

WHY THAT LAST PARAGRAPH MATTERS

Your team's quiet fear is not that AI is hard. It is that AI makes them unnecessary. If you hand them a methodology without addressing that, they will nod and do nothing.

Name the fear in the prompt and the audio overview will speak to it directly.

4B · WHAT TO DO WITH IT

- Send the audio overview to your team before you discuss the plan — not after.
- Print the one-page methodology and bring it to your next team meeting.
- Ask one person to explain it back to you. If they cannot, it needs another pass.

Step 5 — Put It to Work

TOOL: ChatGPT (with Astra) · chatgpt.com · about 15 minutes

What you're doing: the plan stops being a document and starts executing. Notice where you are — this is the same tool you opened with in Step 1.

5A · HAND OVER THE PLAN

1. Open ChatGPT. Use the newest model available to you.
2. Paste or attach your 90-day plan.
3. Send this:

PROMPT 9 — TYPE THIS

```
Here is my 90-day plan. [PASTE OR ATTACH]

Take the first cohort of clients in the plan and get me moving:
  · Draft outreach to each one, in my voice, referencing what I
    actually know about their business
  · Build me a follow-up cadence — two weeks, 45 days, then
    quarterly until I get a yes or a no
  · Give me a simple tracker so my team can see where each one stands
```

5B · IF YOU HAVE COMPUTER-USE FEATURES TURNED ON

Newer ChatGPT models can act on your computer — filling in forms, updating records, putting things on your calendar. If you have that enabled, you can ask it to place the follow-up cadence directly into your calendar and update your CRM rather than just drafting them.

If you do not have that, the drafts and the tracker still do the job. Copy them where they need to go.

THE POINT OF THIS STEP

This is the same tool you opened with. In Step 1 you were typing into it. By Step 5 it is doing the work.

You do not need a new stack. You need to grow into the one you already have.

If You Only Do One Thing

Do not let this workbook become the thing you meant to get to. Ten minutes, right now, gets you further than a perfect plan next quarter.

THE TEN-MINUTE START

```
Here's what my business does. [TWO OR THREE SENTENCES]

Ask me the questions you need to understand my value proposition.
```

Open any AI tool. Paste that. Answer the questions. That is Step 1 begun, and everything else follows from it.

The other ten-minute win

Photograph the business cards you collected at this conference. Hand them to an AI tool and ask it to draft a personal follow-up to each person, referencing what you talked about. Send them tonight while you are still fresh in their memory.

When It Doesn't Work

The output feels generic

You have not given it enough that is specific to you. Go back and add the details you would only know from running this business for years — the client who stayed through something hard, the deal you lost and why, the thing you fix that nobody else will touch.

The plan is too big

You have not been honest about your constraints. Say the real number of hours. Say you are not hiring. Say what you are bad at. Then ask it to rebuild.

It asks too many questions

Use the shortcut from Step 1B — ask it to answer its own questions from what it already knows, then come back with only the genuine gaps.

It forgot something from earlier

These tools do not share memory with each other, and long chats lose the thread. That is exactly why you saved every document. Re-attach the file rather than re-explaining.

I'm worried about what I'm sharing

Keep real client names, contact details, and confidential client data out of it. Everything in this workbook works with categories — "a law firm client," "an accounting practice." If your business has a policy on AI tools, follow it. If it does not, that is worth building before you scale this.

The Last Thing

You already have the hardest thing to get, and the one thing an AI-first competitor cannot manufacture overnight.

The clients already paying you to protect them are your fastest AI clients.

They gave you their data. Their infrastructure. Their security. They answer the phone when you call. Nobody has to earn that twice.

Your clients are about to navigate the most uncertain moment of their careers. Somebody is going to guide them through it.

It should be you.

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