Cut admin time in half in four steps

For healthcare consultants, hospitality owners, and compliance officers. Copy the prompts, put them where the work already happens, and keep a human on the approve button. A 12-person veterinary practice used this to go from two hours of daily admin to fifteen minutes.

How to use this template

1. Work one step at a time — do not automate before Step 01 is stable.
2. Copy each prompt as-is, then swap the bracketed placeholders for your own context.
3. Keep the approval step. Every output is a draft until a human signs off.

STEP 01

Prompt structure

One reusable scaffold instead of a fresh prompt every time.

Every good prompt names four things: who the model is, what it is looking at, what it must not do, and the exact shape of the answer. Write the scaffold once, then only the context line changes day to day.

THE SCAFFOLD

```
ROLE: You are my operations assistant at a 12-person veterinary practice.
CONTEXT: I will paste a client email below. Our tone is warm, plain, never salesy.
CONSTRAINTS: Do not invent prices, dates, or medical advice. Flag anything you
are unsure of as [CHECK].
OUTPUT: A ready-to-send reply, under 120 words, plus a one-line summary of
what I promised.

EMAIL:
"""
<paste here>
"""
```

TEACHING IT YOUR VOICE

```
Here are three replies I wrote myself. Describe my tone in five rules I can
reuse, then rewrite the draft above so it follows those rules.

1. <paste reply>
2. <paste reply>
3. <paste reply>
```

Integration tips

- Keep one master scaffold in a notes app; copy it, never retype it.
- Name the output length and structure explicitly — drift is almost always a missing OUTPUT line.
- Use a [CHECK] marker so uncertain facts surface instead of hiding.

Watch for: If output drifts, the missing piece is almost always OUTPUT format — be specific about length and structure.

STEP 02

Tool integration

The workflow lives inside the inbox, docs, and CRM you already run.

Pick the one place the work already happens and put the prompt there — a saved reply, a doc template, a CRM note field. No new stack, no extra login for the team to forget.

INBOX TRIAGE

```
Sort the emails below into: needs a reply today / needs a reply this week /
no reply needed.
For each in the first group, draft a reply using my saved scaffold.
Return a table: sender | intent | urgency | draft.
```

DOC TO PROPOSAL

```
Using our proposal template below, turn these discovery notes into a first
draft. Keep every template heading. Where the notes are thin, write
[NEEDS INPUT] instead of guessing.

TEMPLATE:
<paste>

NOTES:
<paste>
```

Integration tips

- Gmail/Outlook: save the scaffold as a template or canned reply.
- Docs: keep a proposal template with fixed headings the model must preserve.
- CRM: put the follow-up prompt in the deal note field so it travels with the record.
- One home per prompt. A prompt stored in a separate app gets used twice and abandoned.

Watch for: Store the prompt where the work lives, not in a separate tool.

STEP 03

Automation result

Drafts, summaries, and follow-ups waiting before you open the thread.

Once a prompt is stable, put it on a trigger: a new email, a finished meeting, a stalled deal. The output is always a draft for a human to approve — never an auto-send.

MEETING TO ACTIONS

```
From this transcript, produce:
1. Five bullet summary.
2. A table of actions: owner | action | due date.
3. Any decision that was made but has no owner, listed under RISKS.
Use only what is in the transcript.

TRANSCRIPT:
<paste>
```

FOLLOW-UP SEQUENCE

```
Write a three-touch follow-up sequence for a lead who went quiet after our
proposal.
Touch 1: day 3, helpful, no ask. Touch 2: day 8, one specific question.
Touch 3: day 15, polite close-out.
Under 90 words each, our warm plain tone, no urgency tricks.
```

Integration tips

- Triggers worth starting with: new inbound email, meeting recording finished, deal untouched for 7 days.
- Route every generated draft to a review folder or drafts box — never straight to the client.
- Log what was approved unedited; that is your real automation rate.

Watch for: Keep a human approval step on anything a client will read.

STEP 04

Scaling strategy

One template per recurring task, reviewed monthly, shared across the team.

Growth comes from coverage, not cleverness. List the tasks that repeat weekly, give each one template, and review the set once a month: what got used, what got edited heavily, what should be retired.

FIND THE NEXT TASK TO AUTOMATE

```
Here is a list of tasks my team repeats each week, with rough hours.
Rank them for AI suitability using: how repetitive, how much judgement, how
sensitive the data.
Return a table with a recommended first step for the top three, and say which
ones we should NOT automate and why.

TASKS:
<paste>
```

MONTHLY REVIEW

```
These are last month's saved prompts and how often each was used.
Tell me which to keep as-is, which to rewrite, and which to retire.
For each rewrite, give the improved version.

<paste usage list>
```

Integration tips

— Keep the template library in one shared folder with an owner per template.

— Track edit-weight (how much you rewrite), not just usage count.

— Retire ruthlessly: five templates in daily use beat twenty nobody trusts.

Watch for: A template you rewrite every time is a template that needs fixing.

NEXT STEP

Want help wiring this into your own tools?

Book a free 30-minute discovery call with KAI by Kayo Services. Bring your list of weekly repeat tasks and we will pick the first one to template together.

Full step-by-step guide: /prompt-guide