

AI Setup Checklist

From Repeat Questions to Instant Answers in 5 Hours

Use this checklist to build the AI system that handles your repeat work so you don't have to.

PHASE 1

Capture the knowledge

Hour 1–2

Step 1 Identify Your Repeat Questions

- ☐ Open your Slack/email/DMs from the past 2 weeks
- ☐ List every question you answered more than once
- ☐ Group them into categories (operations, sales, support, marketing, etc.)
- ☐ Highlight the top 10 most frequent questions

EXAMPLE CATEGORIES

- "Where is the [doc/link/process]?"
- "How do I handle [customer situation]?"
- "What do I say when [objection/scenario]?"
- "What's the status of [project/task]?"

Step 2 Document Your SOPs

- ☐ Create a simple Google Doc titled "AI Playbook"
- ☐ For each repeat question, write:
 - The question
 - Your exact answer (copy–paste from past responses)

- Context needed (when does this apply?)
- Examples (real scenarios where you used this)

- ☐ Format: Question → Answer → Example
- ☐ Target: 10–20 Q&As minimum

Step 3 Add Your Brand Voice

- ☐ Copy 5–10 of your best email/message responses
- ☐ Note patterns: Do you use first names? Emojis? Bullet points?
- ☐ Write 2–3 sentences describing your tone: formal/casual, brief/detailed, friendly/direct
- ☐ Add this to your AI Playbook as "Voice Guidelines"

PHASE 2

Choose your AI tool

Hour 3

Step 4 Select Your Platform

Pick ONE to start:

- ☐ ChatGPT Custom GPT (best for internal team Q&A)
- ☐ Zapier + OpenAI API (best for automated workflows)
- ☐ Intercom/Drift AI Agent (best for customer support)
- ☐ Notion AI (best for searchable knowledge base)
- ☐ Claude Projects (best for document-heavy workflows)

DECISION GUIDE

- Budget under \$100/month → ChatGPT Custom GPT (\$20/mo)
- Need CRM integration → Zapier + OpenAI
- Customer-facing only → Intercom/Drift
- Internal team wiki → Notion AI

Step 5 Set Up Your AI Instance

- ☐ Create account and workspace
 - ☐ Upload your AI Playbook (the Q&A doc from Step 2)
 - ☐ Configure basic settings (temperature, response length, tone)
 - ☐ Test with 3 sample questions from your list
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PHASE 3

Train the system

Hour 4

Step 6 Feed Real Examples

- ☐ Input 10 real past conversations (anonymize if needed)
- ☐ Show the AI what "good" looks like:
 - Question received
 - Your actual response
 - Outcome/result
- ☐ Add edge cases: "When X happens, do Y instead"
- ☐ Include "escalation triggers": "If customer says Z, alert human immediately"

Step 7 Define Boundaries

- ☐ List what AI should NEVER do:
 - Make pricing promises
 - Confirm legal/compliance details
 - Handle refunds over \$X
 - Approve contracts
- ☐ Add these as hard rules in your system prompt
- ☐ Set up human handoff triggers

PHASE 4

Test and refine

Hour 5

Step 8 Run Live Tests

- ☐ Send 5 real questions to the AI
- ☐ Compare AI answers to your past answers
- ☐ Score each response: Accurate? On-brand? Complete?
- ☐ Adjust playbook where AI missed the mark

Step 9 Set Up Access

- ☐ Invite your team to the AI system
- ☐ Create a simple guide: "Ask [AI Name] before Slacking [Your Name]"
- ☐ Set expectation: AI handles 80%, you handle the 20% edge cases

Step 10 Monitor and Improve

- ☐ Review AI conversations weekly (first month)
- ☐ Add new Q&As as they come up
- ☐ Track time saved: "Questions answered without you"
- ☐ Refine voice, accuracy, speed based on feedback

PHASE 5

Scale

Week 2+

Step 11 Expand Use Cases

Once your first AI works, add:

- ☐ Customer onboarding sequences
- ☐ Sales objection handling
- ☐ Meeting prep briefs

- ☐ Weekly report generation
- ☐ Content repurposing (turn long docs into summaries)

Step 12 Automate Handoffs

- ☐ Connect AI to Slack/email/CRM
- ☐ Set up auto-responses for common questions
- ☐ Route complex questions to the right human automatically
- ☐ Track metrics: response time, resolution rate, satisfaction

YOUR FUTURE

What changes

BEFORE AI

- You answer 50+ repeat questions per week
- Your team waits for you to respond
- Onboarding new hires takes 40 hours
- You're the bottleneck

AFTER AI

- AI answers 80% of repeat questions instantly
- Your team gets unblocked 24/7
- Onboarding new hires takes 5 hours
- You focus on the 20% that needs you

QUICK START

If you only have 1 hour today

- ☐ Open your messages from the past week
- ☐ Copy-paste your 10 most common answers into a Google Doc
- ☐ Sign up for ChatGPT Plus (\$20/mo)
- ☐ Create a Custom GPT and upload your doc
- ☐ Test it with 3 questions
- ☐ Send the link to your team

Done. You just bought back 10 hours per week.

RESOURCES

Tools and next steps

RECOMMENDED TOOLS

- ChatGPT Custom GPT → chatgpt.com
- Zapier AI → zapier.com/ai
- Notion AI → notion.so
- Intercom Fin → intercom.com/fin

NEXT STEPS

- Book a 15-min setup call → [book here](#)
- Join the AI Operators community → t.me/nl1ai_bot
- Follow for weekly AI workflows → @nextlevelone.ai

REMINDER

The real comparison

METRIC	TRADITIONAL	AI SYSTEM
Training time	40 hours	5 hours
Cost per hire	\$3,000	\$500
Response time	Variable	Instant
Consistency	Depends on person	100%
Scalability	Limited by headcount	Scales per channel
Your availability	Always required	Approve once, run forever

BOTTOM LINE

You don't need more people. You need a system that answers the same questions instantly, consistently, and at scale. This checklist is that system.

Want help building yours? Book a 15-min setup call → api.leadconnectorhq.com/widget/bookings/ashley-mcpherson