Your Monday checklist

From "Let AI Do the Boring Parts & Free Your Team for Work That Matters," CA Craft Beer Summit, November 11.

Three rungs

- **Playing around:** a chat that starts over every time
- **Set up:** it knows your business and your files
- **Running:** it works on its own and flags what changed

You can start on the second rung Monday.

Four habits that move you up

1. **Tell it what it can't see.** What each number means, how your week runs, what you changed and when. Put it in a file once, so every question starts from the same understanding. *(Template: the cheat sheet for your files.)*
2. **Check it against a number you trust.** Before anyone reads an insight, tie the total out to a report you already rely on.
3. **Lock in what works.** Once a report or a deck comes out the way you want, save the format, so next month comes out the same. When you ask what it would change, it recommends and you decide. *(Template: the story file.)*
4. **Put it on a schedule.** A report that runs on its own doesn't wait for the one person who usually builds it. *(Template: the brief's job description.)*

Pick the first report

Automating a report that was never useful gets you a useless report faster. Four questions before you start:

- Does it happen on a schedule?
- Is it the same steps every time?
- Does someone act on what it says?
- Would you notice if it were wrong?

Four yeses is a good place to start.

Doing it safely

- **Use a business account,** and check the data settings before you connect anything.
- **Only the access it needs:** read-only where you can, and permissions so everyone sees only what they should.
- **A person checks what goes out:** it drafts and recommends, and nothing leaves the building without you.

The safety guide goes further, with a short checklist and links to the best-practice guides.

This Monday

- [ ] Pick one report that gets four yeses
- [ ] Fill in the cheat sheet for the files behind it
- [ ] Run it once, and tie the total out to a number you trust
- [ ] Write down what it got wrong, and add that to the cheat sheet

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