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The Solo Operator AI Toolkit

Ten AI workflows to streamline your business, so the busywork handles itself and you stay in your zone of genius.

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Start here

Most of us are using AI like a smarter version of Google. I want to show you what happens when you let it take real work off your plate. This guide gives you ten workflows, chosen because they cover the work that often consumes the most time in a solo service business. Try one out this week, and let them show you what is possible when you hand off the work draining your time and spend more time doing the high-level work only you can do.

Terms & tools you should know

90% of my AI-related work is done in Claude. Here are the primary Claude tools and terms you should know about before you start.

Project

A dedicated workspace for one client or one area of your business, holding all the background that belongs to it.

Scheduled task

Work that runs on its own, on a schedule you set.

Skill

A saved playbook that Claude follows the same way every time.

Cowork

Where Claude works alongside you across your files and apps, which is where most of these workflows live.

Connector (MCP)

A secure link between Claude and an app you already use, like your email or your document storage, so it can read what is in there and, with your permission, make changes.

Code

For when you want something built for real, like a calculator or a website, described in plain English and written into working software.

Newbie at Claude? I recommend these resources for getting started:

Teacher's Tech (youtube.com/@TeachersTech) Jamie Keet's plain, patient walkthroughs of the tools and how to use them.

Ruben Hassid (ruben.substack.com) His How to AI newsletter, full of prompts and workflows you can copy straight into your own business.

Anthropic Academy (anthropic.skilljar.com) Free courses with certificates from the company that makes Claude, including AI Fluency, Claude Code and an intro to Cowork.

A word about your role

Think about the tasks that take up your day. Formatting the proposal. Cleaning up the notes. Chasing the invoice. Rewriting the same email for the fourth time this month. Sure, all of it has to happen, but NONE of this is the reason someone hires you.

They hire you for the thinking. The judgment you built over years of doing this work. The instinct that tells you a client is asking for the wrong thing. The taste that knows when something is good enough to send. The imagination to see the angle nobody else in the room can see. Those parts are yours, and yours alone.

So when you hand the execution over to AI, you are clearing space for the part of you that is truly valuable to your client. Every hour you get back is an hour for strategy, for the relationship, for the idea that turns a decent project into the one they tell people about. Which means you have a real job inside every workflow in this guide.

You are the filter.
Claude will hand you lots of stuff, some right and some a total miss. It's YOUR job to sort it.

You are the standard.
AI has no idea what great looks like in your field, at your level, for this client. You do.

You are accountable.
Your name goes on it, so read every word before it leaves your hands. Every single one.

You are the imagination.
AI can only do what you tell it to. Your creativity, resourcefulness, and communication are crucial.

Use these workflows to get out from under the endless tasks draining your time and brain space. Then do the parts only you can.

Ten workflows to steal

Pick the one that matches whatever is draining you most right now, give it a spin this week, and come back for the next one. Let these inspire you to think of your own.

WORKFLOW 01

Discovery call to written diagnosis

This turns a good sales conversation into a document proving you truly understood them, and makes you a no-brainer hire.

Trigger	The call ends and the recording finishes processing.
You hand it	The transcript, your notes, and the intake questionnaire.
You get back	A one-page diagnosis you can lift into the proposal.

The prompt

You are my strategy partner. Below is a discovery questionnaire and a call transcript from **[client]**. Read both as one body of evidence. Pull out: the repeated language they use to describe the problem; the hidden differentiators they mentioned but did not position around; their top three audience objections; the emotional tension underneath the project; and the positioning gap their offer is currently sitting in. End with one paragraph of direct strategic diagnosis in plain English. Do not write copy yet.

Then: Ask it what five questions you still need answered before you can scope this properly. That list becomes your follow-up email, and it puts you miles above every other service provider they are talking to, because they can feel that you get them.

TIP: DO THIS INSIDE A PROJECT

Open a Claude project for that client and drop in everything you have: their website copy, the intake form, anything they sent you, then the transcript when the call wraps.

WORKFLOW 02

Walk into the call already knowing them

This is the prep you always mean to do and rarely have time for. It takes a couple of minutes now, and people can tell on the call that you did your homework.

Trigger	A sales call lands on your calendar.
You hand it	Their website, their LinkedIn, and whatever they wrote in the booking form.
You get back	A one-page brief you read on the way to the call.

The prompt

I have a sales call with **[name]** at **[company]** tomorrow. Research them and give me one page: what they sell and to whom, how they currently position it, what their site and messaging are doing badly, who their real competitors are and what those competitors do better, and any recent news or hiring that hints at what they are working on. End with the three questions I should open with, and one observation that shows them I did my homework.

Then: Save the brief into their project when you are done. If they sign, you are already several steps ahead on day one.

TIP: TURN RESEARCH ON FIRST

Run this one in a regular Claude chat, and before you send it, click the plus sign under the chat box and switch on research. That is what sends it out to read their site, their LinkedIn and anything recent, instead of answering from memory. It takes a few minutes longer and comes back with real detail you can use on the call.

WORKFLOW 03

Proposal in 30 minutes or less

You only have to write your offer doc once. After that every proposal runs through the same engine with a different client dropped into it, so your time goes to the positioning and the pricing instead of the formatting.

Build first	One offer doc: every package, what each includes, scope language, pricing logic, and two proposals that won.
You hand it	The diagnosis from workflow 01, plus the offer doc.
You get back	A first draft you edit rather than write. Ask for it as an interactive page and it reads better than a PDF.

The prompt

Draft a proposal for **[prospect]**. Use my offer doc as the spine and scope it to the problem in the discovery notes below. Write in my voice. Include: a short diagnosis of what is broken at the root; the recommended package and why it is the right one; deliverables; timeline; investment; and what a successful outcome looks like in their words, not mine. Stop short of a signature block. I will handle final pricing and positioning.

TIP: MAKE IT A SKILL

Once a proposal comes out the way you want it, say *turn this into a skill called /proposal, and include my structure, my tone and my pricing language*. Claude writes the playbook and saves it. From then on you type /proposal, point it at the discovery notes, and get that same quality without rebuilding it every time. This is worth doing for anything you produce more than twice.

WORKFLOW 04

Onboarding: brief, scope and welcome

The most expensive hours in any project are the ones between when they say yes and when the work starts. This gets all of it out of the way in one pass.

Trigger	Contract signed, kickoff call done.
You hand it	The kickoff transcript and the signed scope.
You get back	A creative brief, a task list and a welcome email, all in one pass.

The prompt

From the kickoff transcript and signed scope below, write: a creative brief covering goal, audience, deliverables, constraints and definition of done; every task this project created, grouped by phase and marked with who owns it; and a welcome email in my voice confirming what happens next and what I need from them.

Then: Read the brief, fix what it got wrong, and send it to the client as your kickoff summary.

TIP: USE CLAUDE CONNECTORS

In Claude, go to Customize on the left, down to Connectors, then browse for the apps you use. With your email tool connected it writes the welcome email straight into your drafts, ready for you to check and send. With your project management tool connected, such as Monday, Asana or ClickUp, you can tell it to put the tasks on the right board, assigned and dated. With your documentation tool connected, like Notion or Drive, it sets up the client's folder and files the brief there. Once things run the way you like, ask Claude to turn this whole process into a skill so that it knows what to do every time you onboard a new client.

WORKFLOW 05

One doc or transcript into a month of marketing

You have already done the thinking on this. It is sitting in a strategy doc, or a talk you gave, or a podcast you went on, or one of those long emails you wrote a client at midnight. There is no reason to start from nothing every week.

Trigger	You finish any piece of long-form thinking or speaking. Once a month is plenty.
You hand it	The source, plus samples of your own writing so it sounds like you.
You get back	A bank of angles you choose from, instead of a blank calendar you dread.

The prompt

Below is a piece of long-form thinking on **[topic]**. Pull from it: three LinkedIn angles, each built on a distinct argument; two newsletter angles with subject lines; one lead magnet concept with a working title; three ad hooks; and two podcast pitch angles. Give me each angle in one line and the argument underneath it in two. Do not write the full assets yet. I will pick which ones to expand.

Then: Pick the three you like and ask it to write them in your voice. Twenty minutes of your time, and a month of content to work from.

TIP: KEEP A PROJECT FOR YOUR OWN MARKETING

Make one Claude project that holds your best posts, your newsletters and anything else that sounds like you, and run this workflow inside it. The voice comes back right because it has real examples to work from. Once that is dialled in, turn it into a skill so writing a month of content is one command.

WORKFLOW 06

Ship it clean, and survive the feedback

These two sit on either side of every deliverable you send. The first finds the weak spot before your client does, and the second turns a messy feedback email into a reply you feel good about.

Before it goes out

You are a senior critic reviewing my draft of **[deliverable]**. The brief is below, followed by the draft. Read the brief first as the standard. Then audit the draft section by section, and for each one name: what job it is trying to do, how well it is doing that job, and the single thing weakening it. Flag every moment where I am hedging, playing safe, or drifting from the brief. End with a prioritized list of changes ranked by impact, not by ease.

After the feedback comes in

Below is client feedback on **[deliverable]**. Sort it into three buckets: things they are right about, things that conflict with the strategy we agreed to, and things that are taste-level where reasonable people could differ. Then draft a reply in my voice that addresses each group, agrees where I should agree, holds the line where I should hold the line, and proposes one clear next step.

TIP: RUN BOTH INSIDE THE PROJECT

Run these inside the client's project, where the brief and the history already live. The critique one stings a little the first time you read it. Run it anyway.

WORKFLOW 07

The Monday morning inbox sweep

Connect your email, your team chat and your project management tool once, and after that you can run these three while the coffee is brewing.

The inbox

Pull my last five days of email. Tell me what needs my attention and why, group the rest by theme, and draft replies in my voice for anything straightforward. Flag anyone who has been waiting on me for more than three days.

The channels

Sweep my team chat from the last week. Who asked me something and never got an answer, what decisions were made that I should know about, and what has gone silent that should not have.

The week

Now look at my project board and calendar together. Tell me what is due this week, what is slipping, and what I am overcommitted on. Then give me a realistic Monday-to-Friday list, ordered, with the one thing that matters most each day.

TIP: MAKE IT A SCHEDULED TASK

Once you trust what it gives you, ask Claude to run this every Monday at seven and send you the summary, and it happens without you opening anything. Wrap the three asks into one skill first, then put that skill on the schedule. That is your first agent, and it took ten minutes to set up.

WORKFLOW 08

The bookkeeping sweep

This is the part of the business most of us avoid until March. Connect your bookkeeping and payment software, such as QuickBooks and Stripe, or honestly, just hand over a folder of statements and let it sort them out. Bonus: your bookkeeper will love you for how organized everything arrives.

Hand it the mess

Here are twelve months of bank and card statements. Sort them into labeled folders by month, then build one master spreadsheet: date, vendor, amount, category, and a flag on anything that looks personal or duplicated. Summarize what you could not categorize confidently and ask me about those.

Ask it the questions

Pull my P&L for the last two quarters and tell me in plain English: where the money went, which subscriptions I pay for and never use, which clients are most profitable per hour, and which invoices are unpaid and how overdue. Then draft the chase emails.

Keep your bookkeeper, always. What this does is make you the client they love, because everything arrives organized and categorized and you turn up with better questions. It also means you know your numbers between statements instead of once a year.

TIP: ON SENSITIVE DATA

Treat this like any other tool you already trust with business files: no riskier than your accountant's portal or your Dropbox. Turn off model training once in Settings under Privacy, keep the connectors on read-only where you can, and if a document has full account numbers on it, black those out before you upload.

WORKFLOW 09

Talk to your project management board

You will still open your board, just not every single time something needs to go on it. With your project management tool connected, such as Monday, Asana or ClickUp, you can add a task, assign it to someone, flag it as critical or move a due date simply by telling Claude cowork to do it for you.

Things to say to it

"Put this on my list, and put these two on my assistant's list. The second one is critical."

"Remind me to follow up with Sarah on Thursday, and remind my VA to send the files before then."

"Here is the transcript from this morning's call. Turn everything we committed to into tasks, assigned and dated."

"What is overdue, what is stuck, and what has to happen before Friday?"

> The Friday one
>
> Review my board and tell me: what got done this week, what slipped and why it probably slipped, what is at risk next week, and what I should take off the list entirely because it is not moving the business.

TIP: TRY THIS WITH VOICE

Wispr Flow is a dictation app that turns anything you say into text in whatever window you are in. Get it, and start your day with a brain dump: talk out everything in your head, yours and your team's, in whatever order it comes. Then finish with "update my board with all of that, mine assigned to me and the rest to my assistant." Two minutes of talking, and your board is current.

WORKFLOW 10

Screen recordings into finished SOPs

You cannot hand off what only lives in your head, and let us be honest, you are never going to sit down and write it all out. So do not write it. Record yourself doing it once and let it do the writing.

Trigger	You are about to do a repeatable task. Hit record and narrate as you go.
You hand it	The transcript of your recording. Three or four at once is even better.
You get back	An SOP anyone could follow, filed in Notion, Drive, or wherever you keep your documentation, plus a list of what to automate next.

The prompt

Below is a transcript of me walking through **[task]**. Write it up as an SOP someone could follow without asking me a single question: the trigger, the tools needed, numbered steps, the decisions I make and what I base them on, common mistakes, and what "done" looks like. Then tell me which steps are pure mechanics a VA or an automation could take over, and which ones need my judgment.

TIP: WHERE THIS GOES

Run it in a normal Claude chat, or in a project you keep for your own operations. Paste the prompt, paste the transcript underneath it, and send. Then, with your documentation tool connected, say "create a database for all my SOPs and add this one." From there, every SOP you write is just "add this to my SOP database," and it knows exactly where to file it.

Prompts for everyday work

These are the ones I find myself using over and over. Worth keeping in your back pocket.

After a call

What questions do I still need to ask in order to [goal]?

What was most surprising about this meeting?

Identify upsell opportunities from this conversation.

Sharpening a draft

Make this clearer without losing my voice.

What is the one thing weakening this draft?

Cut this by 30 percent without losing a single idea.

Rewrite this so every sentence is 13 words or fewer.

Before you write a word

List the direct, indirect and emerging players in [client]'s space.

Describe a day in the life of their ideal customer.

Pull the most emotionally resonant language out of these testimonials.

TIP: KEEP PROMPTS SIMPLE

Prompts do not need to be long or complicated. Talk to AI the way you would talk to a very smart assistant, and when you are unsure, ask it to ask you clarifying questions first. When you get a result you love, turn it into a skill.

Build your own tools

Calculators, branded assets, whole websites. AI does way more than write, and none of this needs a developer, a budget or a line of code from you.

Interactive tools and apps

A pricing or ROI calculator, a scorecard, a quiz that segments leads, a pipeline tracker, a client directory built from notes you already have. Put a client-facing one behind an email address and you have a lead magnet with real substance.

Branded assets

Use Claude Design for these. Load your fonts, colors and voice once and it produces on-brand work every time: an offer PDF, a one-pager, a pitch deck, a welcome packet, a case study.

Live websites

Claude Design handles these too. Ask it for a landing page built on your brand, hand it the copy plus your own images and video, and it comes back designed. Then deploy it, point the domain at it, and wire up the form.

TIP: HOW TO START ONE

You do not need to know exactly what you want before you start. Say "I want to build [thing]. Ask me everything you need to know first, then build me a first version I can click around in." The questions alone will sharpen the idea, and from there you react to what you see: more like this, less like that. Nothing comes out right on the first try, and that is normal. The calculators and apps I built for my own business took a lot of no, more like this. Your expertise is the difference between something rough and something you would put your name on.

Your first 30 days

I know this can seem like a lot, so here is a plan for your first 30 days. One thing at a time, using work you have to do anyway. Even if all you manage is week one, you will still be ahead of most people in your field.

WEEK 1

Get set up

- Paid plan and the desktop app
- Start recording every call
- Add voice dictation if you want it

WEEK 2

Load your clients

- A project per active client
- Run workflow 01 on a real call
- Save the diagnosis into that client's project

WEEK 3

Connect and package

- Connect your email and project management tool
- Run the Monday morning inbox sweep for a week
- Turn your best result into a skill

WEEK 4

Hand it off

- Put one skill on a schedule
- Record one screen share, get one SOP
- Give one finished system to your VA

Thirty days from now you will have a business that runs on systems instead of on your memory, and hours back that used to disappear into admin. Keep going and those hours compound into the work that moves your business forward. Don't forget to experiment, use your imagination, and have fun ◡̈

Parting words

Every tip and workflow in this guide exists to help you reclaim the hours you have been spending on things that you do **not** have to be doing, so you can spend more hours in your zone of genius. The next step is simply to start! Pick one workflow, adapt it to fit your business, and notice how much lighter your days feel.

Then keep going. Keep shoving things off your plate until the only work left is the work that needs YOUR brain.

Because the version of you with room to think is the one who catches the angle everybody else walked past, builds the offer only you could have built, and still has something left at the end of the day. That is the person your clients rave about, and every hour you free up is another hour you get to spend being the best, highest, most powerful version of yourself.

Rooting for you,

Chava

The hours are yours again. Now let's make them pay you properly.

Creative CEO Academy is a 12-week accelerator for experienced freelancers that walks you, step by step, through the business side of the business:

- Offers your dream clients say yes to
- Sales conversations that feel effortless
- Marketing that has the right clients already sold
- Systems that hum along without you
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