THE 5-MINUTE FILTER FOR BUSINESS OWNERS

The 20-Task Business *Scorecard.*

Don't try to fix every chore at once. Some chores belong in a $15 tool. Other moments need your real voice. Use this sheet to sort your week into **three clear buckets in 5 minutes**:

✓ BUCKET 1: HAND OFF FIRST

Safe Folder Helper

Repeats every week using your rules, old emails, ad sheets, or notes. Runs inside `AI_Workspace` in Draft-Only Mode. **(11 of 20 tasks)**

BUCKET 2: SIMPLE TOOL

Built-In $15 Tool

Already done 100% by a booking link, Stripe page, or ManyChat word. Do not build custom AI for this. **(4 of 20 tasks)**

BUCKET 3: KEEP HUMAN

100% Your Real Voice

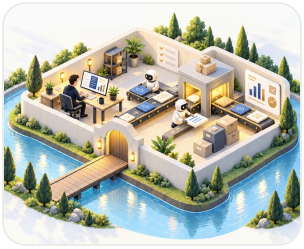
Uses live credit cards, ad budgets, tax forms, or 1-on-1 coaching care. Never hand these to a bot. **(5 of 20 tasks)**

HOW TO SCORE YOUR WEEK IN 5 MINUTES

Step 1: Check Your Chores.
Look at Tasks 01 to 20 on Pages 2 and 3. Check every chore you still do by hand.

Step 2: Skip Red & Yellow.
Cross off any task marked *Simple Tool* or *Keep Human* so you don't waste time.

Step 3: Pick #1 Green Task.
Circle the one green chore that steals the most hours. Build that one first.



Why Every Green Task Lives in One Safe Folder

Every green chore on Pages 2 and 3 follows the same safe rule. Your AI helper reads copies of files you drop into Tray 1. Then it puts finished drafts inside Tray 3. It never touches your hard drive. It never spends money. And it never clicks Send without your 10-second check.

PART 01 • MESSAGES & TRAFFIC

Tasks 01–10: Email, Leads & *Paid Ads*

Check the box on the left for every chore that steals hours from your week:

Category A: Email & Client Replies (Tasks 01–05)

SAVES 6–10 HRS / WK

PICK	WEEKLY BUSINESS CHORE	BUCKET	HOW TO RUN IT SAFELY	TIME SAVED
☐	01. Morning Inbox Sorting	✓ HAND OFF FIRST	Helper tags Urgent, Lead, Billing, or Noise in Tray 3.	3–4 hrs/wk
☐	02. Writing Common Client Replies	✓ HAND OFF FIRST	Reads your FAQ + 3 old emails in Tray 2; saves drafts.	3–5 hrs/wk
☐	03. Weekly Newsletter Drafts	✓ HAND OFF FIRST	Turns a 2-minute voice note into a draft in your voice.	2–3 hrs/wk
☐	04. Sending Free PDFs & Tags	⚡ SIMPLE TOOL	Use normal Systeme.io rules. Zero custom code needed.	1–2 hrs/wk
☐	05. Refunds or VIP Client Chats	✋ KEEP HUMAN	High-trust or money talks need your personal reply.	Human Only

Category B: Paid Ads & Social Videos (Tasks 06–10)

SAVES 5–8 HRS / WK

PICK	WEEKLY BUSINESS CHORE	BUCKET	HOW TO RUN IT SAFELY	TIME SAVED
☐	06. Reading Weekly Ad Numbers	✓ HAND OFF FIRST	Drop weekly ad CSV into Tray 1 for a simple report.	2–3 hrs/wk
☐	07. Writing 5 New Ad Hooks	✓ HAND OFF FIRST	Helper writes 5 new scripts modeled on your #1 winner.	2–4 hrs/wk
☐	08. Turning 1 Video Into Captions	✓ HAND OFF FIRST	Drop video notes into Tray 1; get post drafts in Tray 3.	2–3 hrs/wk
☐	09. Comment-to-DM Keyword Replies	⚡ SIMPLE TOOL	Use ManyChat's built-in keyword tool for $15/mo.	2–4 hrs/wk
☐	10. Changing Live Ad Budgets	✋ KEEP HUMAN	Never give AI access to your card or live ad switches.	Human Only

PART 02 · STUDENTS, CALLS & TOOLS

Tasks 11–20: Skool Group, Calls & *Daily Admin*

Keep checking any weekly chore that you or your team still do by hand:

Category C: Skool Group & Course Students (Tasks 11–15)

SAVES 5–9 HRS / WK

PICK	WEEKLY BUSINESS CHORE	BUCKET	HOW TO RUN IT SAFELY	TIME SAVED
☐	11. Answering Student Q&As in Skool	✓ HAND OFF FIRST	Helper checks your lesson notes in Tray 2 and writes a draft.	3–5 hrs/wk
☐	12. Turning Call Notes Into Checklists	✓ HAND OFF FIRST	Drop call notes into Tray 1; get an action list in Tray 3.	2–3 hrs/wk
☐	13. Weekly Member Wins Summary	✓ HAND OFF FIRST	Summarizes student wins and open questions for Friday.	1–2 hrs/wk
☐	14. Video Hosting & Logins	⚡ SIMPLE TOOL	Use Skool or Systeme.io member logins. Zero custom code.	1–2 hrs/wk
☐	15. Personal 1-on-1 Coaching Care	✋ KEEP HUMAN	Let your helper pull the link, then add your own kind note.	Human Only

Category D: Calendar, Admin & Custom Tools (Tasks 16–20)

SAVES 6–12 HRS / WK

PICK	WEEKLY BUSINESS CHORE	BUCKET	HOW TO RUN IT SAFELY	TIME SAVED
☐	16. Morning Call Prep Sheets	✓ HAND OFF FIRST	Helper makes a 3-bullet prep sheet from your old notes.	2–3 hrs/wk
☐	17. Custom Client Quote or Report Tool	✓ HAND OFF FIRST	Build one clean tool inside `AI_Workspace` that you own.	4–8 hrs/wk
☐	18. Call Booking Links & Reminders	⚡ SIMPLE TOOL	Use Calendly or TidyCal out of the box.	1–2 hrs/wk
☐	19. Taxes, Legal Forms & Bank Wires	✋ KEEP HUMAN	Final sign-off and bank wires stay 100% in your hands.	Human Only
☐	20. Deleting Master Client Folders	✋ KEEP HUMAN	Keep the Ask-First switch ON and always work on a copy.	Human Only

TURN YOUR SCORE INTO FREE HOURS

Your 4-Weekend *"One Helper at a Time" Plan*

Count how many green boxes you checked. Do not set them all up today. Follow this easy 4-weekend plan. Get one helper running well before you add the next one:

WEEKEND 1 • SAFE FOLDER + INBOX

Make `AI_Workspace` + Task #01/#02

Make your safe folder and paste `RULES.md`. Drop 3 old emails into Tray 2. Run your 10-minute morning email helper in Draft-Only Mode.

WEEKEND 2 • PAID ADS & HOOKS

Add Task #06/#07 (Weekly Ad Reader)

Drop your weekly ad CSV into Tray 1. Let your helper spot tired ads and write 5 fresh hooks from your #1 winner.

WEEKEND 3 • SKOOL GROUP Q&A

Add Task #11/#12 (Group Q&A Helper)

Put your lesson notes and FAQs in Tray 2. Now student questions get warm draft replies in 15 seconds.

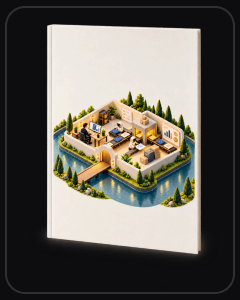
WEEKEND 4 • FRIDAY BRIEF & TOOLS

Add Task #16/#17 (Call Prep & Tools)

Run all 4 helpers together. Turn your messiest client sheet into a simple tool that you own 100%.

COPY-PASTE PROMPT: YOUR #1 TASK STARTER — RUN INSIDE AI_WORKSPACE

```
"Follow RULES.md. I run a [Coaching / Course / Skool / Agency] business. My #1 weekly time-waster from the 20-Task Scorecard is: [Task Name]. Tell me the exact 3 files to put inside 2_Reference_Docs and write my daily 1-click Draft-Only prompt."
```



READY TO SET UP YOUR #1 HELPER LIVE?

Open Your 45-Minute Safe AI Setup Workshop

Watch Videos 1, 2, and 3 in the member area. Copy and paste the exact safety and helper prompts onto your laptop today.

OPEN THE WORKSHOP MEMBER AREA →