AI Client Support System

Hey there, Alexandra. How are doing today?

Fine. Fine. Fine. Hi.

Hey.

Welcome back. Yes.

We're actually in the middle of a class changeover, so you may be one of our only students today, interestingly enough.

Change which changes?

Changing of the seasons. Right?

Ah, okay. Ah, okay. I see. I see.

Turn your video on. It looks like something's turning off. I just see a black screen, just so you know.

Yeah. Yes. It's slow, but it's coming. My computer is low.

Ah, I see.

Yeah. The video is not coming through, but I can hear you okay.

We'll go with that. Yeah. Yeah.

Yes.

How are you doing today?

Fine. Fine.

Today Hey.

Hey. Yeah.

I I I did the overtime, so I don't have a lot of sleep.

Oh, no.

I wanted to participate I wanted to participate at the class. So I said, okay. I participate I participate in the class after I go to sleep.

What time is it there?

It's eleven. Eleven AM.

AM? Oh, okay. You just haven't had sleep because of stuff you're doing in your life.

Yes. Yes. Because I'm working on nursing, so I did the six sixteen hours.

But I slept only one hour, I think.

Oh, wow. Yeah. I promise to make it easy on you today. Yeah.

So is it I I am only alone. Is it right?

We usually have five, six students, in today's class. So I'm not sure where the other ones are today, but, hey, they're lost.

Right.

Right. Oh, yay. Yay. Okay.

Well, the good news is classes.

Oh, really?

I know your classes.

It's very practical. Yeah.

So Yeah.

It's why it's why when when even I didn't sleep, I want to participate because I I know that it's very practical. It's a huge saving time.

So Oh, I appreciate that. Yeah. Yeah. Well, I take that as a huge compliment because you said you're a nurse. Right?

Yes. Yes.

Okay. Yeah. I know how busy you and the like people like you are. So the fact that you're taking the time with only sixteen hours of shift and one hour of sleep, I'm impressed.

Yes.

Well, good for you. I mean, the people who make it tend to be the ones who put the extra effort in. Right?

Yeah. Well, cool.

Well, how about this? I'll if it's only you, I think we can go through today's material somewhat quick, get you to the exercise so that way we can get you to bed, and then you don't have to stay up too late.

My guess is the class reminder didn't get sent out actually now that I think about it because Kim's off today.

That's right.

Well, let's just dive in while we can get you to bed.

Okay.

And I just wanted to share.

I don't know. I think you were in the class where I showed you this, right, where I, inside ChatGPT made these prompt blocks. Right? So this one has actually seven, and this is how I made the slide deck in NotebookLM. I think you were Yes. In the class where I showed this. Right?

Yes. Yes.

Okay. Got it. So this beautiful slide deck, same methodology as before.

Highly recommend if you're making classes, things like that. Again, NotebookLM has made my life so much easier. And, frankly, I don't even know how to make these graphics, so I just wanna get credit.

Yeah. Exactly. Like, how would I make this? You know? No way.

But I wanna talk to you today about how we can tie in this whole month. And I can't remember which week you started because I I don't think you were here all month, were you? Or were you and I forgot you were.

No. No. I went there all the month. Yeah. Gotcha. Yeah. Two two week two weekend.

Yeah.

Okay. Got it. So then you at least saw us you only missed one week this month. So you've seen us do the sales system for overcoming objections and the coaching package.

Got it. So what I wanna talk today is how do you bring those things together. Right? Like Yeah. You've already made the sale at this point in time, and you have a transcript or emails or some kind of content from this person.

And Yeah. How do you turn that into something more?

Right? And if you make a AI conversation like I've suggested earlier in this month for each client, which I'll show you that again just as a refresher, now you have support with your coaching.

You have assistance to help you with ticket management. You know, if this person has a customer complaint and they wanna know something, or you wanna know something and you can't remember what they talked about in the last session, this is how you can do a future sales promotion, sell them a second ninety day coaching package. And then finally, I think the most important thing here is with each client you do with the system I'm gonna show you today, and it's not complex at all, actually, is marketing insight.

You can take you can take your coaching. You can take your sales conversations and all of that to figure out more so who's your avatar.

What are your customers like, you know, personality wise? What are their preferences? What problems do they face?

And you can then look at optimizing your marketing efforts because you're basing them off real conversations you had with people in either your sales conversation or in coaching calls live with you.

So we can tie everything we've done in together in this month into something that is useful for a whole bunch of stuff.

Yeah.

So, essentially, what I'm trying to do is help you go from just getting the client to delivering the result. If you already have the sale, you know, now you have to fulfill the order. Right? You have to do the ninety days of coaching if you do a standard ninety day coaching package.

So this for a lot of people if they've never had a client this can be a little bit scary. It can be something where we're not sure what to say or do in a coaching call and that can lead to a little bit anxiety even I'd say and I think a lot of us especially if we've never had a coaching call, that session one call, we don't even know necessarily what we're going to do with this person even if we've practiced it in a coaching program or gotten certified. But the good news is the sale, as long as you're using something to record the calls like an AI notetaker I use Fathom but there's tons of them out there something to record what they're saying and your questions, That alone can actually tell you what to do in the coaching package. What to do in the coaching call, what to say, homework, all kinds of things. It can even help you with this person's not taking action.

So we're trying to basically jump the bridge from how do we use what we already know from the sale to actually serve the client.

Okay. And basically, I want you to build a system today that makes fulfilling your coaching package feel organized, deeply personalized to them, and highly automated.

That way you're not having to reread notes, you're not having to go find that one document, it's all in a simple system, and I'll show you a few ways to do it.

Great.

So before your your call, remember that in your sales call, that's technically your first diagnostic session. Even though you have a niche, right, you have an avatar and you're working with a similar problem, each person is going to have different needs, they're going to have different requests, they're going to have different problems. Even though they might be doing weight loss with you, they might have different reasons to lose weight or different complications. So we're trying to figure out what makes this person unique to that problem, to that desire, the outcome they're seeking in that first call.

If you do SPIN Selling to the sales methodology I taught in week one, you might have missed that one, Alexandra, so something to check out there. But you essentially investigate them. What are they trying to accomplish? What are the barriers?

Where are they getting stuck? All of that information from a sales call, although it does help you make the sale, it's actually what is essentially your compass for the coaching package. You now know here's the overarching thing they wanna get from coaching. You now know what they're afraid of.

You now know if something was so motivating to them that they spent thousands of dollars buying a coaching package from you, then that's also the same motivating thing or things that you're going to use in the coaching program that you've made for them.

Even if you have tools and techniques you got from classes you've taken, you're still going to wanna make sure it's aimed at whatever the highest motivating thing is for them. And your raw notes, the AI notetaker notes that is, that's going to inform us. So not only did you win the sale, but you also got the exact blueprint to help them succeed, even plugging it into your preexisting system. So before you even start your coaching with them, it's truly important to go through an effective sales process because it's going to inform the ninety day coaching package.

So overall here, when you're working with someone, you have your before with your each session where you might review your notes. I usually have five minutes for each call for this exact reason. I actually go into the AI notes that I am gonna show you today, and I just ask it questions to give me a summary.

Then on the session, you know, you actually coach them, and sometimes I'll actually go into the AI conversation that I'm gonna show you today, on the call with the client.

So that way, if I get stuck or I need something to do or maybe there's a detailed one or both of us can't remember, I can simply go back to the AI conversation and ask it, making my life a lot a lot easier. But afterwards, you take the transcript from your call, step three here, and, again, AI notetakers make this easy. You copy paste the transcript into the AI conversation, either in ChatGPT, Clodge, Gemini, whatever you're using, upload it into your chosen one.

And then over time, as you're coaching this person or even if you tried to sell to this person and they didn't buy, that would be useful information too.

But each coaching session is now going to help you become educated about how to make future sales, how to improve your marketing, how to sell to that same person again. Oh, I'm sorry. Give me one second here. Got someone unexpectedly knocking at my door here. Sorry about that. One sec. I'll be right back.

Sorry about that. Okay. So coming back here to check the door.

Okay. So this is essentially something I just wanna show you that each step of the process here, AI can help. It can help before the call and getting ready for it. It can help on the call. It can help after the call, so you don't have to remember every single detail from the call. And over time, you're gonna use this to work on improving your marketing.

So if you asked better questions like SPIN selling, you already have the map.

If we map out SPIN Selling, which is the acronym we cover week one here of this month, situation, problem, implication, need, payoff well if you know their situation, when you're trying to think about how to coach this person then I already know where to start. You are where you are. I don't have to guess.

And then as I uncovered the problem but we now know okay here's what this exact person is dealing with even if they're similar to many other clients you've had.

And most importantly, in my opinion, is the implication.

The why. The five whys exercise. Someone says I want to lose weight, you say why because I got some concerning cholesterol information from my doctor and then you say why is it important to you that you deal with your cholesterol?

They might say oh my dad died in his 50s from heart disease. And then if you say why again they might say I don't want to end up dead like my dad not me to my grandchildren.

That why is far more motivating than I want to lose weight.

I want to lose weight is like New Year's resolutions. Most of them never turn into anything.

So get to that bottom why because that same why that got them to buy in the sales conversation is likely the same why that's going to get them to take action from a coaching call with you.

Right? Or at least you need to tie into that. So when they have a hard time, let's say, you're a weight loss coach and they keep eating those oily fatty foods that could threaten their cholesterol, you can help them tie back into Hey remember that first call? You said you don't want to end up like your dad dying before you even meet your grandchildren.

That's why we're talking today. That's why you don't eat the pizza.

Right? Or whatever it is, that why that's the most motivating thing to them. So now throughout the ninety days, I'm going to use that information and new information of course you're going to continuously learn about this person but that why from the sales call actually is something you can use in most of your calls. You always want to tie it into why are they even here in the first place?

Not just the what are you doing but why.

And then the need payoff your whole coaching ninety day package is aimed at that ninety day target. That's the thing you're walking towards. That's the thing you're trying to accomplish with them. So you don't even have to guess, they told you.

In the example I gave they said I want to lose weight because I got concerning information about cholesterol and I'm afraid of dying too young to meet my grandkids. If that's what we're trying to accomplish then I want to know okay what does weight loss look like?

Does that look like you lost thirty pounds, forty pounds? Does that look like you like what you see in the mirror? Is it a felt experience? If you know what they are trying to achieve, only at the end of the ninety days can you point to the result and say, hey, look what we've done together, but now you know what the metric for success is because that's what they bought from you.

They bought, they paid for the need payoff.

That's why they're here and that's likely why they're even doing coaching at all because coaching, even if we enjoy it, is an obstacle that they have to overcome to get to that ninety day target.

So every session needs to stay centered on that very promise.

Oh, I'm sorry.

I have a question.

Oh, go ahead.

For for the for the five y or for for five y, is it good for for one on one coaching, or it it can be good also for one for a group coaching?

Both. For sure. When when I Yeah. Yeah.

When you do a group one I mean, if I were to do five whys in a group exercise, I would have everyone write down in the chat, something like that. Or if it was a homework, they would do this on their own. And they would just go through what is that thing they're trying to achieve in the program. And then I want wanna know why are you trying to achieve that.

You know? And I would ask them five times. Why do you wanna achieve that? Why do you wanna achieve that?

Right? So and then the idea is that you're helping them uncover what's motivating to them. So that's useful in a group or one on one setting. It's just if you're doing it in a group setting, I like to have them put it in the Zoom chat because then at the end of the call, I can download the chat and then use that to learn about my students, my audience.

Okay great.

Sometimes you gotta get a little creative in order how to to know how to record what they're saying here.

Keeping this in alignment with that thing that they bought, the need payoff, that's the promise.

So all of your weekly sessions really should be going back to the client's exact words or what is I've called before the park bench offer. You know, their exact words in the example again from earlier is lose weight and lower your cholesterol so you can meet your grandchildren. I would rephrase it in the positive personally, or you could say so you don't die in your fifties and not meet your grandchildren. Right?

You wanna make that the the north star, the thing that everything builds towards. So, basically, you start where they are in session one, and you can use the seventy thirty model. Seventy percent of what you do with this person is roughly your tools, your examples, your techniques, the things you've learned, like, here in VCA, Alexander, other programs you've taken. But then thirty percent is basically going to be what came alive today.

So this is largely what you're going to be doing in those actual sessions with people. Again, all of those sessions, though, are aimed at whatever that first promise was.

So a lot of coaches make on their coaching calls they fall into generic coach talk. They treat it like everybody's the same.

They'll do things like lose the thread of where they were I've even had a coach say to me before I can't remember what we talked about last time which is a huge indicator you didn't check your notes! And they're not looking at Okay, I'm speaking to one person and of course with group coaching this would be different too but with the one on one at least, you want to make them feel like this is custom built for them even though, like we said before, it's seventy percent your structured system, but it's thirty percent what's real for them.

So what do you do instead of you know not remembering what they said because you haven't talked in a week or two is you want to have something where it's systematized. Your coaching should feel like there's clear progression happening in each session. What I want to show you today will support you in doing that and tracking said progression just in case you hit, you know, if you're a nurse and work forty, fifty, sixty hours a week and maybe you forgot because you had a long day. You know, like, that stuff happens, of course.

So to them, what if you do what I'm gonna show you today, it's gonna look like continuous memory. Like, you're keeping the thread. You remember their progress. You're celebrating that progress with them, and there's measurable progress. You can actually tell them, Hey, here's where you are and here's where you were. All of this can be done in AI without overtaxing your brain which might already be heavily taxed.

So instead of doing it the old way where we try to just remember everything and maybe reread our client notes, you're gonna have one single source of truth for each client. One chatty PT conversation or Gemini or Clog conversation per client.

That one conversation will help you know where they're currently at, where they were when they started, where were their realities, what they see is possible for themselves because that might change every time after working with you. You'll know in the same conversation what are they trying to achieve. Right? What's that desired state?

What do they get at the end of ninety days? Right? Because they're gonna use specific words for that, and you wanna remember what those exact words are. You're gonna know the problems, the roadblocks, and you'll know what milestones you can start to structure for this person, again, all in one single chattypity conversation per client.

Or, you know, I I I say ChatGPT just because it's the chosen model I'm using for this class. Yeah. So Yeah.

My setup is simple. You have one project, and inside of that project, you have one conversation for each client. You have one project for all of your clients, but each conversation is specific to that person that you're talking to.

So then you usually have essentially, you go into your chosen AI. If if you make this like a folder, like, on Windows or Mac, you know, you have folders and items inside of folders. So your first folder is whatever your chosen LLM is, Chat, GPT, Claude. I probably put Gemini in there too.

And then you're going to there's two ways to do this you can do it where there's a project per a client. If you have a big client, it makes sense to have one project for them because you might be working on multiple things for them But You you could also have one project and all of your clients are in the project. It's really up to you. I just wanted to show you just a way to think about this.

It's like a folder structure.

So Yeah.

We're really trying to compartmentalize your memory. We're we're trying to make it where everything is into one single place. So this we this is why we have separate conversations. Each conversation is a compartment. Right? It's a cupboard. It's a drawer with only that one client's stuff in there.

Also, we don't wanna have multiple clients in one conversation because now you're gonna have mixed chat experiences. You're gonna get hallucinations.

The AI is going to think Jane is actually Joe, that kind of stuff. So don't talk about multiple clients in the same conversation. Talk about one client per conversation.

This will also help with, you know, making sure you're not saying something that secret or private or delicate to the wrong client. Right? We don't wanna mix that details up.

And if you've followed along from the all day implementation day, right, where we talked about, how to make custom GPTs and projects, and we've talked about this in previous months, you can actually move from your sales project or the conversation where you had a practice conversation with this person and move it into your client support project.

So if you have one project in your AI aimed at helping you sell, now you can simply, and I'll show you how in a minute here, move that conversation to this new project we're gonna build today, which I'm I call simply the client support project or your client support AI. This is just where I get support for each person I work with. That's all.

So I'm essentially moving my sales notes into this new client project. I might have to upload some files if they weren't in my AI already, and then I'm using that to generate reports, brief summaries of this person to better understand them.

Pretty simple.

And during and after, when you're actually having these conversations, it helps you prep, recap, but importantly here is the accountability piece.

You can, with a simple, you know, add to your Google Calendar, but I'll also show you a way to do this inside of HubSpot, you can set automated reminders to look at and follow-up with these people.

This can be if you didn't sell someone, you can set reminders to network with them, to prospect with them, and then take those notes from them to keep trying to advance them towards a sale.

You can also use this as a way to just simply have everything in one spot before each session so you don't have to think about it. It's all right there.

Yeah. Wow.

But here here's something I really liked about AI that is probably my favorite use case. I've had clients get stuck because I always have them build really techy marketing things, and sometimes that's overwhelming for people.

So if they get overwhelmed, then I use this same AI chat to break down their milestone, the thing we're trying to work on, like this complex technical thing, into little steps.

Because sometimes I think it's easy, but for a client who's never done some of this stuff, it might be actually pretty difficult. So I have found that breaking down complex things into simple things that that person can understand and remember, this chat was gonna know multiple conversations from this person. So it's gonna learn about how do they learn, how do they grow.

I can then go to on the call with them and go, okay. Got it. That sounds complex. Give me a second here. I wanna break this down into a simple step by step process.

So now that build a website, which is a huge task, is broken down into something anybody can understand.

Right? On the call. And I can even share my screen showing them I'm doing this. Right? A lot of people actually appreciate it when I do that with them.

Maybe they have a limiting belief.

Maybe they don't think they can do the thing. Now I could go into that same chat and use a cognitive behavioral therapy, CBT, reframe because I might not be able to think about how to help them with this limiting belief.

Or maybe they're stalling. You know, they're not doing anything or they're procrastinating.

Now I can using that same chat that has that first conversation in it from the sales call, I can pull up those from spin implication. Right? It's the I. I can pull that up to remember, oh, yeah. That's why they hired me in the first place. That's the thing that gets them to take the action.

So for me, this is basically a copilot. It's something that I use in my calls, before the calls, after the calls, and I use it to sell to these people. All the same tool.

And this is also gonna make it a little bit different because, you know, on the consultant side, which is just something that we've been working on. Right? Your systems, your frameworks, that master business file I gave you a while back, combined with the things you're learning from Annie and Sasha from all of us, really, your presence, your heart coach heart, we're literally just creating a system with digital memory to combine these two things.

So it's still you being empathetic, it's just using AI to make things easier overall. And then let's say you've been doing this for a while, you have talked to people, you have solved problems with them, you've seen how they got stuck, you've seen their dreams, their desires, you've gone through all of this.

So when you've done that, now I can take those client sessions where I've heard maybe from four or five different clients similar friction or objections or problems.

I can then turn that into that client struggle into a hook.

Now I know, oh, these five people deal with this problem. There's other people in the world who would like that hook.

Think of a hook like a fishing hook. It's something that gets someone to pay attention to your business and to potentially buy from you. Now I'm taking those real world situations from my clients and I am turning them into hooks for content, copywriting, email, and that then turns around and attracts my next client and then we start all over again. That new client helps me identify more friction points, problems, challenges. So as I get more clients, I become more and more clean and clear around who it is I serve and how I serve them simply by having these transcripts and conversations in your chosen AI.

I like this little feedback loop because now I have ideas to test in my marketing, but they're not guessing tests. Right? They're tests based on real people's real problems.

And I don't have to remember all of them which is a big problem for me personally. I'm sure many people have that problem too.

What I also like is that this keeps you know, over time, over that ninety days, you have a very clear progress of what they have actually achieved, the problems you help them overcome. And from this chat, you now can show them the next ninety day coaching package, the next ninety day goal.

So Even though the intention for this chat, this conversation was to help them and to, you know, help you track and remember, now you can use it to sell them a second ninety day coaching package or a new product specifically trained and honed in on where that person is because if you've helped them with the problems to this point, they're probably at a new place with new problems.

So it preps you for that, you know, end of ninety day follow-up sale.

And this is a way to do it ethically because you're essentially using real data on this person, not, you know, pressure sales, not black hat marketing, which is where we use tricks to get someone to buy.

You're quite literally saying, hey. We made it to the top of this mountain.

Let's see what your next mountain is.

Because they're just going to continuously have, depending on what your coaching is, new problems they have to overcome. You know a heart coach is often going to start with something like help me stop fighting with my husband or wife all the time, and then they might find, oh okay, Now how do I have a relationship where we bring our children into this? Or how do we have a business together? You know, what tools could we use in our relationship to do that? Right? There's another peak that is likely already been talked about in your previous sessions.

No more guessing.

Yeah. Yeah.

So I just wanna show you a quick, easy oh, I missed that miss in place thing.

I don't even know what that is. Good old AI slide sometimes say things weird, but I wanna show you how I use this. I think this is the last.

Yep. Yep. So I wanna show you how I use this real quick here to go from one step to the other. So I'm just gonna open up my ChatGPT, and you can see we have these projects on the left hand side.

And on the all day implementation day, showed you how to make a custom GPT. How you make a project is exactly the same nearly. I click new project here, and and this one, I'm just gonna call this my AI client support system. You can call us whatever you want, but this is just what we're gonna be putting all of these conversations I keep talking about inside of.

Once I create my project, now I have a new folder. And in here, if I click the icon, I can change the icon to other things, other colors. You know, we can go with blue.

And, you know, I like this doctor when I come diagnosing people's problems.

And then you might if you want to rename it because you didn't like the name, just click the name and you can rename it. No problem. Also if I click the name in here, that's how I bring up the instructions.

So here's the cool part. Rather than giving you a copy paste prompt we're going to change models real quick here to thinking we're going to make the instructions for the project using a simple brain dump. Your thoughts turned into a prompt. So remember, we're in projects now on the left, not conversations.

So I'll show you another project here. Here's my Evan GoMed immediate, his name is company, project where I have all kinds of different conversations in here. So this is one project with many, many, many, many, many, many different chats. Each chat is something I'm using to work on, different classes, different ideas, that kind of stuff.

So this is not only an organizational container like a folder, but it also has if I click the name, this one doesn't have any because it's just a folder, but I can have different instructions. Here, I'll just pull up one that is here we go. It has instructions.

So you can see here these instructions, I can make this bigger by dragging this little tiny square here if you want to see what you're typing.

These instructions are simple. Everything in this individual project will follow these rules and instructions.

These are basically a big giant prompt for every conversation in this project.

So in my, project here called v to v marketing coach, I have a bunch of different conversations.

However, all of these conversations follow these instructions. So I don't have to retype these instructions ever again.

That's what instructions are for. Everything in the project, every new conversation put in here, we'll have to follow those rules. So back to the AI client support system we made. The first thing we're gonna do is after we make our little project, we're gonna make the instructions. The instructions are simple and I put some notes here in the exercise to help you remember.

I also gave you a starter prompt if you want in case you're one of those people that you know you don't want to think about prompting, you just wanna have it done for you. But let me just show you even without the exercise. Here's how I do this, and I do this kind of stuff all the time, with conversations. So I'm gonna do what's called a brain dump. A brain dump means to me, click this microphone, not the right symbol that says use voice, click dictate, which is the microphone symbol. And you're just simply gonna tell it again, the exercise instructions will help you if you feel like you get lost.

Tell it it's making instructions. So I'm gonna show you what I mean.

I need your help making instructions for a ChatGPT project called AI client support system.

This is using the ChatGPT feature called projects. So remember, there is a character limit on how long ChatGPT project instructions can be. Make sure your instructions are less than that character limit. This project is simple.

I'm going to take all of my transcripts, notes, details for each client and put them into one conversation per client. So that way, I have an ongoing conversation about each of my clients. I will not have more than one client in a conversation. And I will use this to help me do session recaps, to learn about my marketing insights, such as who is actually my avatar, what are the keywords and phrases my clients use so I can use it in my marketing, but also to sell them other products because I'll know where they got stuck, their personality type.

I'll know all this information from my coaching package that I want to use that to not only help them, to help my business grow, but also to specifically sell this person a second product like another coaching package.

So your output is simple. Make me instructions for this JatchyPT project. So you can kinda see it there, Alexander. I'm not structured really.

I'm just saying things off the top of my head. Again, this will help you if you want to or you can just do what I just did, where I, you know, I spoke from the top of my head of what I'm trying to create. I used the thinking model. If you click the word check your pity on the top left, you click thinking.

Thinking means smarter results usually. Once I'm done dictating, I now have to submit it because I just typed it all out. I could also go in here and edit this if I wanted to, if you're not familiar with the dictation. Once I do this, it usually takes maybe ten seconds to two minutes. On this one, I doubt it'll be that long. Yeah. Here we go.

Alright. So now the instructions for the project we're inside of are right here.

So rather than me having to have some kind of special prompt knowledge, I just took my idea for my instructions, and I had AI create the instructions because it understands what works best for it. Once I'm done, it usually puts it in what this is called a code block, and there's two little squares in the top right. If I click those two squares, just like that, now I've copied it and I go back to the project. The project is on the left hand side.

So in here, ironically named the conversation the same thing, but remember, we click the name of the project and see here I was in the conversation, so when I'm in the conversation, I don't have that same, menu. I can't see anything. So I go back to my left hand sidebar where it says the name of the project I just made.

Now you can tell this looks different. Right? It does not look like a conversation. So if you get lost, oftentimes you're in a conversation, right, not at the project.

A lot of people get lost here for some reason. So click the name of the title, and now I can just simply paste the instructions we just made. Overall, this took me less than two minutes even though I'm explaining it.

So now everything put into this project we just made will follow these instructions. Now, of course, I'm doing a demo, so I'm not going step by step as I normally would. Read through the instructions it gives you.

Make sure that these instructions make sense to what you're actually going to do. You might have to change things in here. Now, also, when you're doing this, if you have your master business file or if you have some kind of documentation about you, your business, your clients, your products, upload any of those files first. You don't have to, but that is good to do.

Then once you have your project, the project we just made, I now have my instructions. The instructions tell it how to behave.

There's one last thing. All your chats are in here. So now I might say, you know, here is a chat I had with John Doe.

And then I might upload a transcript by clicking add photos and files. I might upload a transcript.

I'm trying to find something that's safe and doesn't have a private client information. Here, we'll just go with this one.

So now I upload that let's assume this is a transcript from that conversation I had with John Doe.

This one's taking a little bit long. You can tell how long it's taking because this circle will become completely full when it's fully uploaded.

Then I could say, help me understand how to sell him on the follow-up call. Or, you know, maybe you already sold him. Now you could say, help me under come up with ideas on how to get him to remember the conflict technique I taught him next time he fights with his wife. Right? I can ask it questions. I can say, give me a summary of our last conversation. I can say, what was his ninety day goal he's working towards?

But now as soon as I hit submit, it goes into conversation mode out of project mode. You can see it making it.

Now I just this is a fake one, so we can just ignore what it's saying here. Here's the thing I want you to remember, though. Each time you make a new conversation, you can click either the three dots in the top right.

Oh, they removed the rename feature there. Interesting. That used to be up there. Okay. So now we click the on the left, the three dots, and we can click rename.

So now I just rename it John Doe, something that makes it easy for you to remember this person. So that way next week when John Doe's coaching call comes around, I go into my project, and then I just look for John Doe five minutes before the call, and I say, give me a one page summary of what we discussed.

So now rather than having to reread everything, I can simply read this one page summary.

Now this is coming from a book, so this is will seem a little wonky but you can see where I'm going with this. Right? And if you have it, it's okay if you don't, but if you have it you can also add sources.

So sources are useful because now we can add in say that master business file I keep talking about or your avatar or your coaching technique or anything really, to improve what you're doing. Just remember, if you add a source like the master business file, go back to the instructions.

If I put my mouse over the square right here, I can make the instructions bigger so it's easier to read.

And just add at the very bottom, use file or excuse me. Use source master business file to know all about my business.

But here's another thing I like to do with this.

I like to tell it what my actual techniques are. So for example, when offering me client support, use coaching methodologies such as ones found by people, such as actually, I would just make a list. So such as these ones. So maybe you have a coaching system you like. Cool. Tell it that.

I like Eben Pagan. I like Annie La la. I like Jocko Wellenk. You could even use the name of a system. I'm a big fan of CBT, cognitive behavioral therapy.

Right? I could also say things like an actual coaching system, like the CoActive Coaching Institute.

Right?

You might even have a system put into a file. So then upload that file and then just say, use source my coaching methodology to know how I coach people and to offer support using my methodology.

So if I add that to my instructions because remember, when you add a source, you gotta tell in the instructions, which you click the name to get the instructions, just as a reminder.

If I add a source here like my coaching methodology, it doesn't know what to do with that. So you have to tell it what to do with that inside of your instructions.

So now and you can switch between chats and conversations just by clicking these two names, just in case you didn't know that.

I think you can have up to twenty five files in here. I don't know if they've changed that in the last six months or so. But so now you can see where I'm going with this. Right?

I can add conversations to this new project, by the way. Let's say I had a conversation with someone from Evan. We'll just use this one as an example. Say this is from a conversation about a client, but I didn't have in the project.

At any point, I can just click the three dots to the right of it or over here in the, you know, on the side, and I can click move to project AI client support system. So it's okay if you accidentally make a conversation that's not in the project. Just remember, if you make a conversation not in the project, everything you say in that conversation until you move it in the project will not follow the instructions.

The instructions are only followed by conversations inside of the project. So that's just one important thing to remember. If you make a conversation and you just click new chat, new chat is not in a project. Those are all down here in your recent chat history. So just remember first, go to the project, and then you can just start a new chat in here by typing or move a conversation into this project.

So it's very simple.

I got a couple things I wanna cover here, and we'll get you started.

Oops. I have one question.

Sure.

About the the the master of business document process Yep. Document. Yes.

You have that?

What is it? Is it I'll pull it up. Have especially master business. Yes. But I have only Avatar, stuff like that.

Marketing. Got I I got something awesome for you.

Oh, great.

Let me find it real quick. There it is. Let me think. I am actually going to just I'm just gonna share this with you.

Here we go. So this is a lengthy process. It could take you an hour, maybe ninety minutes to do it. Don't overthink it, but I'll put this in the Zoom chat for you.

Okay.

Here you go. So that link is for the master business file.

That's that file is not in the folder I'm about to share with you, but here's the folder.

Let me get this Zoom thing out of the way. There we go.

I'm gonna share a folder that has the slides and the exercise in here as well.

I just wanted to point out that that master business file is not gonna be in this folder. That's all.

Give me one second. Seems like my Zoom is hanging. Uh-oh.

Hello?

Seems like Warren's frozen.

Here he is.

Yeah.

I have I have a computer that's unfortunately dying, and I have to go pick up the new one in a different state, because I'm traveling.

So apologies for the next week or two while I wait for this new computer to get here.

Every time I stop or start sharing my screen, there's a, like, a fifty fifty chance that Zoom will crash, and that's the way it is.

Oh.

I have to recopy that link now. Hold on a second. The one I was getting you.

Here we go.

Okay. So in the chat is the folder for today, slides and exercise.

There you go. Make it a little more organized for you.

So the exercise is simple. Make this project. Make the project that you can use as your essential AI buddy. Right?

Your AI, I call it the copilot, but you can call it whatever you want. For me, it's not flying the plane. It's simply helping me give more value to these people. This is, by the way, the same method I'll use at the end of twelve weeks to sell them.

It's the same thing I'll use to send them kind of like a I guess it's like a PDF milestone report where, you know, I'm tracking their progress and send it to them. Know, I'll take some quotes from our conversations using this methodology.

So people love it when you pull their own quotes and give it back to them. Know? There's just this little tiny things you can do for value add ons that make these people love you even more because like it or not, the the good old days of doing everything from the top of your noggin are kinda over, and people's ex expectations have gone up. Right? We expect more from coaches and consultants rather than we would when we didn't even know what a coach was. It's a pretty known thing now.

So I find that this is excellent way to simply make things that no other coach is really doing. Very few coaches are using AI assistance to help them in the coaching session or to prep for or to review that kind of stuff. Oh, I don't know very many coaches at all that do this, if at all, ever. So easy value add.

And when you're done, you can share the conversation with them and say, hey. If you'd like to learn more, I would do this after you upload the transcript from their most recent call with you. And you have to share it every time. It's not one time share.

It doesn't work that way. You have to share it manually every time. But share the conversation with them, and you would be shocked how much value I have clients that I worked with two or three years ago doing this. They still have the conversation, and they've been messaging me what to do when they hit the conversation history, context limit.

So I'm telling you, people really appreciate this because they're not gonna collect the transcripts and put them in a conversation. Right? They're not gonna do any of this stuff. So this is a huge value add.

And, again, it is the best sales buddy you could possibly imagine. I mean, imagine a salesperson that knows every single detail of twelve intimate one hour sessions with this person. That coach, that salesperson is gonna sell better than someone who talked to them literally one time and maybe did some Facebook or LinkedIn research on them. Right?

So super useful. Go ahead, Stuart.

Yeah. So so glad I was able to make it.

And it sounds it sounds really wonderful and very, very useful. So I I really appreciate where you're at. The one piece of my normal conversation with either current clients or hopefully potential clients is my email thread. How do you incorporate the most recent flow of emails back and forth into this kind of environment?

The answer I actually do is probably the one I would not recommend anyone, but maybe you to do this. So I'm just gonna throw it out there. This is not easy mode. I literally use Claude code to connect to my Gmail inbox, and then I tell it the name from the email, of that person in a in a a a spreadsheet so that when anybody with one of those emails listed, Claude Code, this thing I built with Claude Code, I should say, it finds their name, looks at my inbox.

As soon as it has it, it extracts that email, and then it API accesses into what I'm using and adds it into a conversation. So I don't know that that's actually the easiest way. The easiest way would be just copy paste the whole thread hitting control a and expand the thread. Right.

Or just do the most recent one because in Gmail, it mine does at least. Has all your previous ones.

Yeah.

Then you just manually do it. The ClotCode one probably took me three hours to figure out.

So I'm I'm so glad to hear you say that because you'll appreciate what I'm about to offer up also. It it occurred to me that with Claude work, which is now new That more of your audience rather than just I May be able to handle that because it's so much more lame and in terms of the instruction you can give it. Yeah. In fact, I don't know if you've done this, but I tried to experiment this weekend, and I'm gonna run it tonight. And that is, I've asked it to now take all of my, coaching on a particular topic, all the files on my computer, and reorganize them all.

And Did it work?

Yeah. Well, I I did a little experiment and say, just grab this folder and reorganize the files in this folder into subfolders that are more organization, and it worked.

Yeah. I don't know how to get it to not run into context limits when you talk about things such as entire computer because that's where token limits can get hit pretty hard.

But if you're smart my whole computer, I'm only gonna do it on a particular service that I offer.

Files that so at the highest level, I've been going to one at a time to be specific. But nonetheless, what you just mentioned In terms of giving me this idea is that I could take the same project instructions and do a ClaudeWorks edition that would then be able to integrate that with all the other documents that are there. So so that's why I'm glad glad to hear you say that.

Yeah. Tied into a spreadsheet if you can because then you have a manual dashboard, I guess you could call it, where you can look at this stuff. And if you don't, sometimes it's hard to see where is it not working. But the reason I don't normally recommend Clog Code is because you have to have very specific kind of thinking to make something like this useful even with the basic prompting.

Because when it doesn't work, that's where the more engineer prompt engineering sort of mind comes in very useful, and not everyone likes thinking that way. Oh, it didn't work. I'm done. You know, that kind of thing.

Okay. But but that's great. Glad to hear that. Okay.

Yeah.

Excellent. Oh, I just realized the time. I have to hop off YouTube, but go make this project. I have been using this for the last three years, and I would say my coaching before, I I don't know. I can't even imagine coaching now without this tool, actually. I I I cannot.

I even have them on you all. Like, I take transcripts from our calls to come up with new classes. So So just want you to know. This a big thing.

So just before you go, you'll take a client's conversation Yep. Pull it into the project when you wanna activate the project on it, and then you'll pull the client back out of the project Nope.

After leave them in there. I'll just take someone from, say, like, a sales project once they buy into client support because it's not the same tool. Gotcha. But every every one client has one conversation. Alright. I'm a minute late. I gotta hop off here.

But Okay. See you. See you later. You'll be on office hour later?

Yep. Yep. I will be.

Thank you so much. Yeah.

You're welcome. Bye bye.

Thank you. Thank you.