AI STARTER PROMPT PACK

Three AI prompts for the work between closed deal and cash collected.

Ready-to-use prompts for Claude or ChatGPT that help growing B2B teams write cleaner handoffs, document processes, and follow up on past-due invoices. Copy, paste, fill in the brackets, and go.

How to use these prompts

> Copy a prompt into Claude or ChatGPT, then replace everything in [BRACKETS] with your own details.

> Review every output before it reaches a customer, a contract, or an invoice. AI drafts; people decide.

> Follow your company's policy on what information can go into AI tools. When in doubt, remove names, account numbers, and pricing first.

> If the first answer isn't right, tell the AI what to change. A short follow-up usually gets you there.

PROMPT 01

The Handoff Brief

Turn messy deal notes into a clean handoff for Onboarding and Billing, with missing details flagged before they cause a problem.

```
You are an operations lead at a growing B2B company. I will paste notes from a closed deal: the contract summary, sales notes, and emails.

Create a one-page handoff brief for the Onboarding and Billing teams with these sections:
1. Customer and key contacts (decision-maker, day-to-day contact, billing contact)
2. What was sold: products or services, quantities, and pricing
3. Billing details: start date, billing frequency, payment terms, discounts, and any free or credited periods
4. Non-standard terms or promises made during the sale
5. Onboarding or implementation expectations, including deadlines
6. Missing or unclear information, listed as questions to send back to Sales

Use only the information I provide. Do not guess or fill gaps. If something is missing, put it in section 6.

Here are the deal notes:
[PASTE NOTES HERE]
```

Tip: Run it on every closed deal for two weeks, then look at section 6. The questions that keep repeating are the gaps in your handoff process.

Tip: Save the output where Onboarding and Billing both work, such as the CRM record or the shared customer folder.

PROMPT 02

The Process Mapper

Get a process out of someone's head and onto paper, with owners, steps, and the gaps nobody has written down.

```
You are a process improvement consultant. I will describe how a process works today, in my
own words. It may be messy or incomplete.

Turn it into a clear process map with:
1. Process name, purpose, and what starts it (the trigger)
2. Numbered steps, each with an owner (role, not person), the system used, and the output
3. Handoffs between teams, marked clearly
4. Common exceptions and what happens in each one
5. Gaps or risks: steps with no owner, no trigger, manual re-entry between systems, or
knowledge held by one person
6. Three improvement ideas, starting with the one that is simplest to put in place

Ask me up to five follow-up questions first if anything important is unclear.

Here is how the process works today:
[DESCRIBE THE PROCESS HERE]
```

Tip: Ask the person who actually does the work to describe it, or record them talking it through and paste in the transcript.

Tip: Use the finished map as the first draft of your SOP. It is far easier to correct a draft than to start from a blank page.

PROMPT 03

The Collections Follow-Up Writer

Write firm, friendly past-due reminders that protect the customer relationship and get invoices paid.

```
You are an accounts receivable specialist at a B2B company. Write a sequence of three email
reminders for a past-due invoice.

Details:
- Customer name: [NAME]
- Invoice number and amount: [INVOICE # / $AMOUNT]
- Original due date: [DATE]
- Days past due: [NUMBER]
- Relationship notes (for example, a long-time customer or an open support issue): [NOTES]

Email 1 (friendly reminder): assume it was missed, restate the invoice details, and include
how to pay.
Email 2 (sent 7 days later): more direct, ask whether anything is preventing payment, and
offer a quick call.
Email 3 (sent 14 days later): firm and professional, state the next step if the invoice
remains unpaid, without threats.

Keep each email under 120 words, with a clear subject line and one call to action. Match the
tone to the relationship notes.
```

Tip: If the customer has an open support issue, resolve it first. Disputes and unpaid invoices are often the same problem.

Tip: Replace the bracketed placeholders, and take out anything your company's policy says should not go into an AI tool.

Where AI helps, and where it doesn't

AI is good at turning messy notes into structure, drafting first versions, and spotting what is missing. It does not fix a process with no owner, no trigger, or two systems that don't talk to each other. Those gaps need a clear process first. Once the process is clear, AI and automation make it faster.

Want help putting AI to work in your operations?

I help growing B2B companies map their customer lifecycle, fix the handoffs, and add automation and practical AI where it actually saves time, with human review on anything that affects customers or billing. For more details, visit www.onestopsourcinggroup.com.

Book a 30-minute call at www.onestopsourcinggroup.com