

Agents of AI

Selecting the Right Tool for the Right Job



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“

What a privilege to be tired from the work you once begged the universe for.

What a privilege to be overwhelmed by growth you used to dream about.

What a privilege to be challenged by a life you created on purpose.

What a privilege to outgrow things you used to settle for.

- Miles Adcox



Build your *Personal* AI Profile.

Most people are still using AI generically. Surface-level answers that need constant re-explaining. There's a better way.

- 01 Move from helpful chatbot to a personalized strategic partner.
- 02 AI that knows your style, values, goals, and client philosophy.
- 03 Stop repeating yourself. Get consistent, tailored output every time.
- 04 Save hours per week. Make better decisions faster.
- 05 **Build once. Benefit for years.**

02 · THE SHIFT

Before AI knew you. *And After.*

The difference between a tool you fight with and a partner you trust.

Before.

Generic AI.

What working with an AI feels like when it doesn't know who you are or how you work.

BEFORE

The Grind

- Constantly re-explaining who you are and how you work.
- Generic advice that doesn't fit your style or your clients.
- Hit-or-miss results that require heavy editing every single time.

After. *Personal AI Profile.*

What working with an AI feels like once it deeply understands you, your business, and your clients.

AFTER

The Leverage

- AI already knows you. It jumps straight to high-value thinking.
- Responses aligned with your values, your tone, your goals.
- A consistent, trusted partner that improves over time.

03 • THE TOOL

Personal AI Profile *Builder.*




A single prompt that turns any AI into your trusted strategic partner.


Good morning, Gorillas


You are my expert **Personal AI Profile Interviewer and Builder**.


Your goal is to conduct a friendly, thorough, conversational interview so we can create a high-quality "**Personal AI Profile**" document.

This profile will serve as my **permanent reference file** so you (and any other AI I use) can work with me as a true collaborative partner who deeply understands who I am.

 Write

 Strategize

 Career chat

 Claude's choice

Paste this into Claude. It will conduct a friendly, conversational interview and build your profile for you.

The *Interview* Process.

How Claude will run the conversation that builds your profile. Five rules of engagement.

- 01 Ask thoughtful, open-ended questions **one or a few at a time.**
- 02 Be curious, empathetic, and non-judgmental.
- 03 Cover the areas naturally through conversation.
- 04 Confirm understanding before moving on.
- 05 One session or several — your call.

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- 04 Confirm understanding of key points before moving on.
- 05 One session or several — **let Claude know when there's enough to synthesize.**

Clean your existing memory.

Before you build something powerful, clear what's already there. This is foundational.

Open Claude. > Go to:

Settings →

Memory

This is where Claude stores everything it has learned about you across all your conversations.

Most people *never* open this page.

This page shows everything Claude has quietly learned about you across all your conversations: **preferences, facts, habits, working styles.**

Left alone, it fills up with outdated, inaccurate, or low-value information that actively hurts performance.

Quick *action.*

Three steps. Five minutes. The foundation before we build something much more powerful.

- 01 **Review** what's there. Read every entry.
- 02 **Delete** anything outdated, irrelevant, or wrong.
- 03 **Add** a few high-level facts you want Claude to always remember — your role, core preferences, how you like to work.

● ● ● memory · in-chat phrases

You can also add memory mid-conversation. Just tell Claude:

→ "Remember that I never want *[x]*."

→ "Remember that my role is *[x]*."

→ "Update your memory with *[x]*."

→ "Remember that I prefer responses under *400 words*."

05 · GET AN AI PREDICTION

Turn off Claude's *optimism.*

When Claude assumes your plan will work, it looks for reasons it will. Invert that and watch what happens.

● ● ● prompt · ai-prediction · pre-mortem

It's six months from now and this is already dead. *Tell me how it died.*

WHY IT WORKS

That shift turns off Claude's optimism. There's nothing to be optimistic about — the premise already says it failed. So Claude stops looking for reasons your plan will work and starts explaining how it fell apart.

Then ask these *four* questions.

After Claude tells you how it died, run this follow-up battery. The answers are usually the most valuable part of the exercise.

- 01 Which failure is **most likely**?
- 02 Which failure is **most dangerous**?
- 03 What's the **single biggest hidden assumption** I'm making? often the most valuable answer.
- 04 Give me a **revised version** of my plan with those gaps closed.

06 · QUICK DEFINITIONS

Two words you *need to know.*

The vocabulary that separates "AI dabbler" from "AI operator."

NOUN

Skill.

A reusable instruction set that teaches Claude a specific behavior.

Skills improve Claude's consistency, speed, and performance on many tasks. Build it once. Use it forever.

NOUN

Projects.

Self-contained workspaces with their own chat histories and knowledge bases.

Inside each project, you upload documents, provide context, and have focused conversations with Claude. One project per topic. One memory per topic.

How and why to *use* projects.

A project is a topic-specific workspace. Treat it like a filing cabinet drawer, one drawer per area of your work.

Create projects for all your most-used knowledge work.

- 01 Put in there **the things you know to be true** — context, frameworks, voice.
- 02 Voice-prompt all your context into a Google Doc.
- 03 Upload it as a **PDF** or **MD** for each project.

07 · THE FOUR JOBS

AI is good at four jobs *an advisor has every day.*

Use the right tool for each one.

AI is good at *four jobs* an advisor has every day.

We'll walk through each one. Right tool, wrong tool, one example.

JOB 01

Getting your thoughts out and structured.

The "I know what I want to say but I can't get it on paper" job.

JOB 02

Compiling and synthesizing from many sources.

Pulling together what you know about a client, prospect, or topic.

JOB 03

Building skills that encode your experience.

Packaging what you do well so AI can do it the way you would.

JOB 04

Acting on your behalf inside your workflows.

From "I ask, AI answers" to "AI watches, AI acts."

Getting your thoughts out and structured.

Turning rambling notes, voice memos, or a half-formed idea into a clean brochure, a client replies, an SOP, a meeting agenda, a one-pager. **The "I know what I want to say but I can't get it on paper" job.**

*Brochures · Client replies · SOPs · Meeting agendas · One-pagers ·
Internal memos · Onboarding docs*

Compiling and synthesizing information from many sources.

Pulling together what you know about a client, a prospect, a topic, an account, into a useful summary. Reading 40 pages of a trust document and getting the three things that matter. Researching a niche before a prospect meeting.

*Trust document review · Prospect deep-dives · Niche research
· Account summaries · Meeting prep briefs*

Building skills that encode your experience.

Taking what you do well, what you've learned over decades, and packaging it so AI can do it the way you would do it. Your seminar invitation script, your discovery meeting flow, your annual review prep, your follow-up cadence. This is the layer where it stops being a chatbot and starts being your assistant.

Seminar invitations · Discovery meeting flow · Annual review prep · Follow-up cadences · Voice & tone guides

Acting on your behalf inside your workflows.

Agents. Pathfinder. The shift from "I ask and AI answers" to "AI watches my work and does things."
Meeting attendant, post-meeting follow-up, relationship intelligence, appointment setting outreach.

*Meeting attendant · Post-meeting follow-up · Appointment
Setting Outreach · Relationship Intelligence*

Different projects.

What goes in each one.

Build a project for every recurring area of your work. Each one is a permanent home for the context Claude needs to do that job well.

Podcasts

Show notes, episode briefs, guest research, transcripts.

Prospect Profiles

Research dossiers, meeting prep, client personas.

SEO / GEO

Keyword research, content briefs, geo-targeted copy.

Interviews

Question banks, candidate notes, debrief summaries, sales analysis.

Branding Guidelines

Voice, tone, do/don't lists, visual rules, examples.

Your next one

Pick the next area where you keep starting from scratch.

**Stop using AI
like a stranger.
Build it once.
Benefit for years.**



THANK YOU

**Now go
build it.**

Frantz Widmaier · CEO, Bill Good Marketing



Questions?

Please **raise your hand** and wait for the microphone to be brought to you **before** asking your question.





NASHVILLE

★ TENNESSEE ★

“FORCE MULTIPLIERS”