TELLEY TAYLOR

A WEEKEND BLUEPRINT FOR BUSINESS OWNERS

7 Critical AI System (Agents) Small Business Owners Over 40 Can Set Up in One Weekend to Save 7+ Hours Per Week

A No-Code Weekend Blueprint. No coding. No stress. Just results.

Telley Taylor

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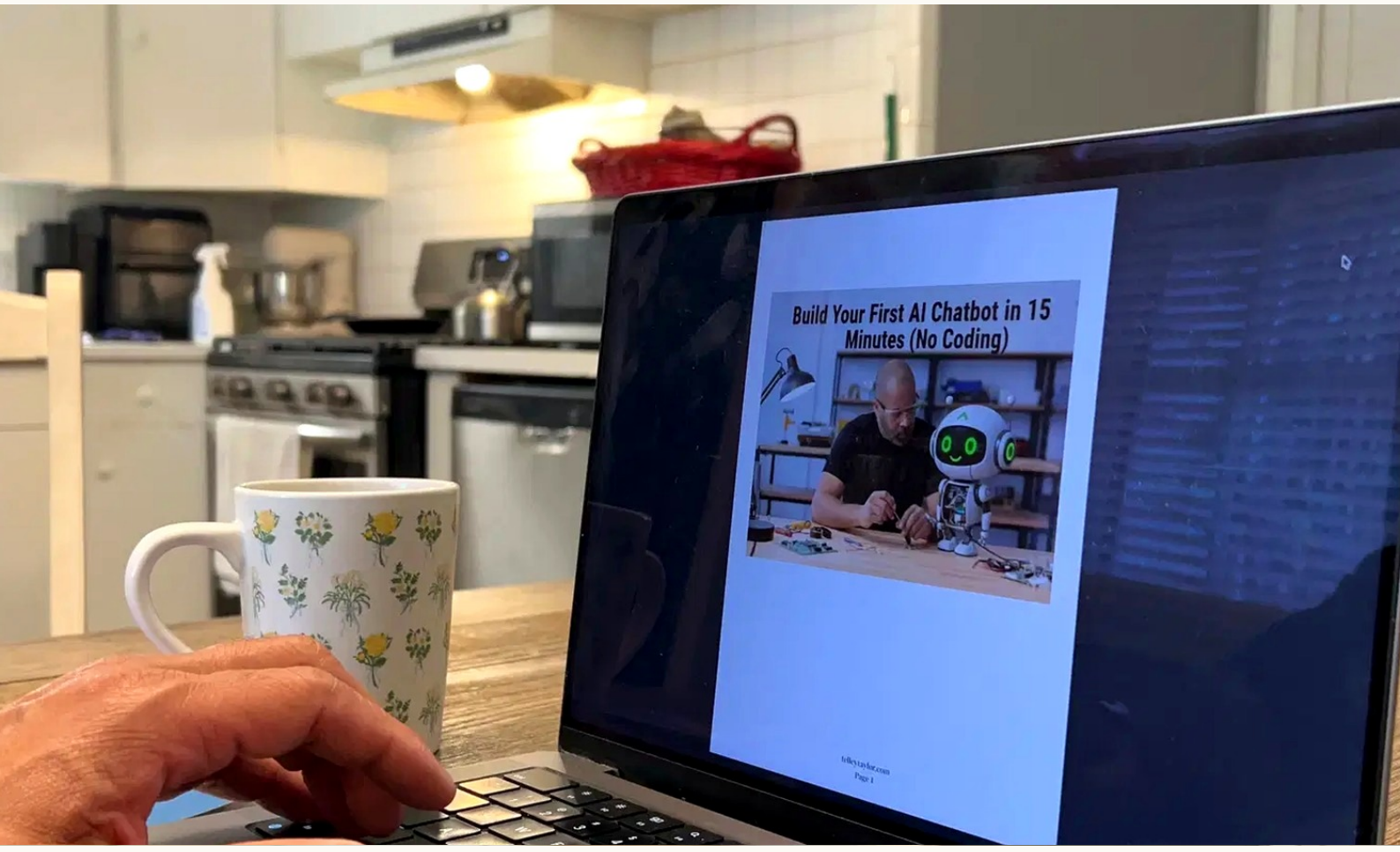

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CONTENTS

What's inside

BEFORE WE BUILD

A letter to you 4

The three rules of this blueprint 5

How to use this book 6

YOUR SEVEN AGENTS

01 The Morning Inbox Agent 7

02 The Follow-Up Agent 10

03 The Content Multiplier Agent 13

04 The Invoice Chaser Agent 16

05 The Front Desk Agent 19

06 The Appointment & Intake Agent 22

07 The Review & Reputation Agent 25

MAKING IT REAL

The weekend plan 28

Your first week with the team 30

What to build next 31

One honest recommendation 32

Common worries, answered 33

A last word, and where to go next 35

Every agent chapter follows the same beats, in the same order. Start with the one that annoys you most, or work straight through.

A LETTER TO YOU

Dear Fellow Business Owner,

If you opened this blueprint expecting a dense, text-heavy manual filled with confusing developer jargon, complex coding tutorials, or a list of 50 different apps you don't have time to learn, you can take a deep breath.

That is not what this is.

As a business owner over 40, you didn't build your company by chasing every shiny new tech trend. You built it on grit, relationships, and hard work. But lately, it feels like the administrative side of running a business, the endless emails, the constant content creation, the scheduling gymnastics, and the invoice chasing, is eating up your evenings and stealing your weekends.

You don't need another software program to manage. **You need help.**

That is why we aren't going to build "systems" this weekend. We are going to deploy **AI Agents**.

What exactly is an AI agent, and why is it different?

For the last few years, software has required you to do the heavy lifting. You had to click the buttons, input the data, and learn the interface.

Think of an AI agent differently. Don't look at it as software. Look at it as a **24/7 digital intern**.

An AI agent is a specialized, smart assistant that can understand your goals, think through a sequence of steps, and execute entire tasks for you in the background. You don't program them with code. You give them instructions in plain English, just like you would delegate a task to a real employee.

And here's the part that matters for your Saturday. You don't need to hire anyone, onboard anyone, or pay a retainer. You sit down once, you write out what you want, and the work keeps happening while you get on with your day.

THE GUARDRAILS

The three rules of this blueprint

To protect your time and peace of mind, every single agent inside this guide follows three strict guardrails. They are not suggestions. They are the reason this weekend will feel calm instead of overwhelming.

1

Zero coding required

If it requires writing a line of code, it isn't in here. Every tool we use has a simple visual, drag-and-drop setup. You type instructions the way you'd explain a task to a new employee.

2

Human in the loop

None of these agents will ever email a client, publish a post, or move money without your permission. They do 95% of the work, but you always hit the final "Approve" button. **You stay in total control.**

3

Deployable in 15 minutes

Each agent is built from a pre-made template plus plain-English instructions you paste in. You can roll out all 7 over a single, casual weekend.

By Sunday night, you will have a team of 7 invisible, hyper-efficient digital assistants running your back office. By next Friday, you'll have 7+ hours of your life back.

Let's meet your new digital team.

Telley

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HOW TO USE THIS BOOK

Every chapter works the same way

Read one chapter and you've read them all in terms of rhythm. That's on purpose. Here is what you'll find in each one, in the same order, every time.

What it does	One sentence, in plain words, on the job this agent takes off your plate.
The job this replaces	The specific chore, named honestly, so you recognise it in your week.
What you need	Two or three things, plus 15 minutes.
The 15-minute build	Numbered steps. The action in bold first, then why it matters.
The exact instructions	A shaded block to copy. Role, rules, tone, and what never to do.
Test it with this	One or two real prompts to try before you trust it with anything.
What to check	The human-in-the-loop list. Not optional, and never skipped.
Where your hours come back	Where the time returns to you. No invented statistics.

You only need one tool to start

You do not need seven subscriptions. Six of the seven agents run inside **one AI assistant**, either ChatGPT or Claude, using a project or custom instructions. Add your existing email and calendar and you're ready for chapters 1, 2, 4, 6, and 7.

Chapter 5 is the only one that needs a different tool, because it lives on your website and answers customers while you sleep. That chapter names the simple options and what each one costs. The whole point is **less software, not more**.

One agent a week is a real plan too

This book is laid out as a weekend because a weekend is a clean container. Your life is not a container. If Saturdays are for your family, build one agent each Sunday morning for seven weeks. You can also start with the single agent that annoys you most and leave the rest for later. **That still counts.**

01

AGENT ONE OF SEVEN

The Morning Inbox Agent

> It reads your overnight email, tells you what actually needs you today, and drafts the replies so you only have to edit and press send.

BUILD TIME	RUNS IN	YOU APPROVE
15 minutes	ChatGPT or Claude project	Every reply

> **Rather not build it?** Marblism's **Eva**, the Executive Assistant, owns this exact job: your inbox and your calendar. See page 32.

You know this one. You sit down with your coffee, open the inbox, and forty minutes disappear. You read a newsletter. You open an invoice notification. You re-read the same message three times trying to work out if it's urgent. Somewhere in there is the one email that actually matters, and by the time you find it your morning is gone.

The real cost isn't the reading. It's the **deciding**. Every message asks your brain for a small verdict, and forty small verdicts before 9am is why you feel tired before you've started.

WHAT YOU NEED

- **An AI assistant.** ChatGPT or Claude. The free versions handle this fine. The paid ones are faster and hold more text at once.
- **Three or four emails you wrote yourself.** Any sent messages that sound like you. Save them in one document. This is how the agent learns your voice instead of guessing.
- **15 minutes** for the build, plus one real inbox batch to test on.

TOOL NOTE, PLEASE READ THIS ONE

ChatGPT custom GPTs are being retired in December 2026, and on some accounts new GPT creation is already closed. So don't build this as a custom GPT. Build it as a **ChatGPT project** or a **Claude project**, or with custom instructions if you prefer something lighter. All three do the same job here, and none of them are being switched off. If a tutorial you find online tells you to create a GPT, that tutorial is out of date.

> *The point of this agent isn't speed. It's walking into your day already knowing what it holds.*

THE 15-MINUTE BUILD

1. **Open a new project.** In ChatGPT, click Projects, then New project. In Claude, click Projects, then New project. A project keeps the instructions and your files in one place, so next Monday you don't retype anything.
2. **Name it "Morning Inbox".** Plain names are easier to find at 7am than clever ones.
3. **Paste the instructions on the next page into the instructions box, not the chat.** The instructions box is the standing brief. The chat is the conversation. Mixing them up is the number one reason agents feel forgetful.
4. **Upload your voice file.** The document with your own sent emails. Name the file **my-voice**. One file is enough. You can add more later and it only gets better.
5. **Set your morning habit.** Each morning, select the overnight emails in your inbox, copy them as plain text, and paste them into the chat with the single word **Batch**. Don't connect your whole inbox yet. Pasting keeps you in control of what the tool sees.
6. **Test it on a batch you already know the answer to.** Pick five emails you have already dealt with. If the agent sorts them the way you would have, it's ready.

MAKE IT FIT YOUR BUSINESS

- **If your inbox is enormous:** paste only the last 24 hours, not the last week. The agent is good at triage, not at archaeology.
- **If you get a lot of supplier email:** add a fourth label called SUPPLIER and ask for those to be grouped separately. Your real customers stop competing with invoices for attention.
- **If you hate copying and pasting:** do it once a day for a week anyway. You'll soon know whether you want a deeper integration, and you'll only pay for one if the habit sticks.

TEST IT WITH THIS

> PROMPT ONE
>
> *Batch*
>
> Paste five real emails after that word. The label is all you need. No long explanation.

> PROMPT TWO
>
> *Here are three emails. Two are junk. Tell me which two, and give me one line on why for each. Then tell me if you were guessing.*

That last sentence matters. It teaches the agent to tell you when it's unsure instead of sounding confident about nothing.

THE EXACT INSTRUCTIONS TO PASTE

COPY THIS INTO YOUR INSTRUCTIONS BOX

You are my inbox assistant. I run a small business and I read every message myself, so your job is to make the reading fast.

I will paste a batch of emails. For each one, give me the sender, a one-line summary of what they actually want, and one of three labels. **TODAY** means a real person needs a decision or an answer from me within 24 hours. **THIS WEEK** means it matters but nothing breaks if I wait. **SET ASIDE** means newsletters, receipts, notifications, and cold pitches.

Then draft a reply for every TODAY email, in my voice: warm, short, direct, no filler. Three or four sentences. Never invent a price, a date, or a promise I did not give you. If a reply needs information you don't have, draft it with a blank in square brackets so I can fill it in.

Never send anything. Never delete anything. Output a plain list, no preamble.

WHAT TO CHECK BEFORE YOU APPROVE

- [ ] **Does it sound like you?** Read the draft out loud. If you wouldn't say that sentence to a customer's face, cut it.
- [ ] **Are the facts right?** Every date, every price, every name. The agent can be charming and wrong at the same time.
- [ ] **Did it promise anything?** A discount, a deadline, a call. If you didn't offer it, it comes out.
- [ ] **Has this person already been answered?** Duplicate replies are the most common first-week mistake.
- [ ] **Is anything private in the batch?** Bank details, passwords, a customer's card. Take them out before you paste.

IF IT ISN'T WORKING YET

If the replies sound stiff, add three more real emails to **my-voice**. If it labels everything TODAY, tell it in the chat: "Too much today. Only mark today if a real person is blocked without me." If it misses a message, it's usually one with no clear ask. Say so, and it will start flagging those as questions to you.

WHERE YOUR HOURS COME BACK

The inbox doesn't get shorter. Your time inside it does. What returns is the **early morning**, that first clear hour before the phone starts. You stop paying the tax of deciding forty times in a row, and you read your email the way you read a list someone else prepared for you. Most people notice it on the second or third morning, when they reach for their coffee and realise they're already finished.

02

AGENT TWO OF SEVEN

The Follow-Up Agent

> It watches the quotes and inquiries that went quiet, then writes the polite nudge in your voice so you can approve it and get paid.

BUILD TIME	RUNS IN	YOU APPROVE
15 minutes	ChatGPT or Claude project	Every nudge

> **Rather not build it?** Marblism's **Stan**, Lead Generation, finds the leads and writes the follow-up. See page 32.

THE JOB THIS REPLACES

Somebody asked for a quote three weeks ago. You sent it. They said "great, let me think about it." Then nothing.

You know a friendly nudge would probably close it. But writing that email feels like asking a favour, or like you're being pushy, or like admitting you need the money. So you open a new draft, type two sentences, delete them, and close the tab. That is the chore. Not the email. The **dread before the email**.

This agent removes the dread by writing the first version for you. You read it, you change a word if you want, and you send. Ninety seconds instead of three weeks of avoidance.

WHAT YOU NEED

- **Your AI assistant**, in the project you built yesterday or a new one called Follow-Up.
- **A simple log.** One spreadsheet, or even one document with four columns: name, what they asked for, date sent, and last contact. If you don't have one, step one creates it.
- **15 minutes** for the build. Two minutes per nudge after that.

> *A quiet quote is not a no. It's a question you haven't asked yet.*

THE 15-MINUTE BUILD

1. **Make the log.** A spreadsheet with those four columns. Ten rows is plenty to start. Don't clean it up, just fill it in.
2. **Copy the whole log into the chat.** Select it, copy, paste. A spreadsheet pastes as a table automatically.
3. **Paste the instructions on the next page into the instructions box.** Notice the intervals. They're short and friendly on purpose. Long gaps read as chasing. Short, warm check-ins read as interest.
4. **Ask for the nudges.** Type **Who needs a nudge today?** The agent reads the dates, finds the quiet ones, and drafts.
5. **Approve one at a time.** Not all at once. Send one, then the next. That's how you stay in control and how you notice when a draft has the wrong detail.
6. **Update the log after each send.** Change the last-contact date. Two seconds, and the agent stays accurate instead of guessing next week.

MAKE IT FIT YOUR BUSINESS

- **If you sell services on repeat:** add a column called next check-in and ask for nudges every 30 days instead of every 7. Repeat customers need rhythm, not pressure.
- **If you sell one big thing a year:** change the intervals to 14 and 30 days. Big decisions need breathing room, and a nudge on day three reads as anxious.
- **If you hate spreadsheets:** use one document with one line per quote. It works just as well and you'll actually keep it up.

TEST IT WITH THIS

> PROMPT ONE
>
> *Who needs a nudge today? Use my table. Show me one draft only, for the person waiting longest.*

> PROMPT TWO
>
> *Read that draft back and tell me how it would land if the customer already decided to go with someone else. If it sounds like pressure, rewrite it softer.*

That second prompt is the best training you can give it. It asks the agent to imagine being on the receiving end, which is the thing you're too close to see.

THE EXACT INSTRUCTIONS TO PASTE

COPY THIS INTO YOUR INSTRUCTIONS BOX

You are my follow-up assistant for quotes and inquiries. I run a small business and I lose work because I hate chasing people.

I will paste a table with these columns: name, what they asked for, date I sent it, last contact. Find everyone where more than seven days have passed with no reply.

For each one, draft a short email. Three sentences maximum. Open with something human, remind them what they asked about in one line, and end with a simple question that is easy to answer yes, no, or not now. Never guilt them. Never say "just following up" or "circling back". Never mention that this is automated. Never invent a discount, a deadline, or a price change.

Write in my voice: warm, plain, a little informal. Use their first name. Sign off simply with my first name.

Then show me a second, shorter version I can send if they still don't reply in another week. Label the two versions Gentle and Final. Keep the Final one just as kind. Output the drafts and nothing else.

WHAT TO CHECK BEFORE YOU APPROVE

- [ ] **Is the name spelled the way they spell it?** Check the email thread, not your memory.
- [ ] **Is the date right?** "Last week" said in the wrong week is worse than no follow-up.
- [ ] **Does it still mention what they actually asked for?** A generic nudge feels automated. A specific one feels like you remembered.
- [ ] **Would you be comfortable receiving it?** That's your final test and it works almost every time.
- [ ] **Is this someone who already said no?** Then leave them alone. A no is an answer.

IF IT ISN'T WORKING YET

If the nudges feel cold, the log is probably missing what they asked for. Put a real description in that column and run it again. If it invents a price, repeat this in the chat once: "Never write a number I did not give you." If it keeps sending the same tone, check the last-contact date actually changed.

WHERE YOUR HOURS COME BACK

This is less about minutes and more about **work you stopped losing**. The time you get back is the hour you used to spend staring at a blank draft, and the evening you spent remembering you should email somebody. There's a quieter return too: old quotes stop sitting in the back of your mind at night. Nothing is unsaid, nothing is forgotten, and you didn't have to become a person who chases people.

03

AGENT THREE OF SEVEN

The Content Multiplier Agent

> It takes one thing you already made and turns it into a week of posts, an email, and a short answer to a customer question, all in your tone.

BUILD TIME	RUNS IN	YOU APPROVE
15 minutes	ChatGPT or Claude project	Every post

> **Rather not build it?** Marblism's **Sonny**, the Social Media Manager, turns one source into the week of posts. See page 32.

THE JOB THIS REPLACES

You know you should post more. You even have the idea. You recorded a video, or you answered a customer's question really well on the phone, or you wrote a long email that was almost a blog post.

Then you sit down to turn it into "content" and the whole thing dies. Five separate captions in five separate voices, each one starting from nothing, at 9pm, after a full day of running a business.

That is not a creativity problem. That's a **volume problem**, and volume is exactly what an agent is good at.

WHAT YOU NEED

- **One thing you already made.** A video, a voice memo (many phones transcribe automatically), a blog post, or a long email. Any one of them.
- **Your voice file** from chapter 1, so the posts sound like you and not like a marketing department.
- **15 minutes** for the build. About 5 minutes per week of content after that.

> *You already made the thing. The agent only carries it further.*

THE 15-MINUTE BUILD

1. **Create a project called Content.** Attach your voice file and your one source piece. If your source is a video, paste the transcript rather than the file. Transcripts work better than video.
2. **Paste the instructions on the next page.** Read the "never" list before you paste it. That list is what keeps the output from sounding like every other business online.
3. **Add three or four posts you actually wrote and liked.** Small, one-post examples. This teaches rhythm more than any instruction can.
4. **Run it once on your source piece.** Read all of the output before you judge it. Usually two of five posts are strong and three need a nudge.
5. **Say what you liked, in plain words.** "The second one is right. Do four more at that length and that level of detail." The agent gets closer fast when you talk to it like a colleague.
6. **Save the winners.** Keep a plain document called **posts-that-worked** and add it to the project. It becomes your real style guide.

MAKE IT FIT YOUR BUSINESS

- **If you're on video:** paste the transcript, then ask for captions that work with no sound. Many people scroll with the volume off.
- **If your customers ask the same questions:** feed it three real questions and ask for three FAQ answers for your website. That page earns its keep for years.
- **If you're not a writer:** record a three-minute voice note on a walk. Transcribe it, paste it, let the agent type. Your voice comes through better when you're talking, not typing.

TEST IT WITH THIS

> PROMPT ONE
>
> *Here is my source. Give me the three ideas first, and stop. Let me pick the one I want to build the week around.*

> PROMPT TWO
>
> *Take post number 3 and cut it to two sentences. Don't lose the useful part. Then tell me what you had to sacrifice.*

Slowing it down at the start gives you better output, and short captions are the usual first result. These two prompts fix both.

THE EXACT INSTRUCTIONS TO PASTE

COPY THIS INTO YOUR INSTRUCTIONS BOX

You are my content assistant. I make one thing a week and you stretch it, without making it sound like marketing.

I will give you a source: a transcript, an article, a voice note, or a customer question. First, pull out the three most useful ideas in it. Then produce three things: five short social posts, one email of about 150 words, and one FAQ answer of about 80 words that I could put on my website.

Rules. Write in my voice, using the voice file I gave you. Short sentences. No more than three hashtags. No emoji. No "game-changer", "unlock", "elevate", "in today's world", or "let's dive in". No hollow encouragement. Every post must contain one concrete, useful thing a reader could do this week.

Vary the angles across the five posts: one story, one mistake, one how-to, one question to the reader, one short opinion. Do not repeat the same opening. Do not invent statistics, client names, or results.

Format as a plain numbered list under three headings: SOCIAL, EMAIL, FAQ.

WHAT TO CHECK BEFORE YOU APPROVE

- [ ] **Would you say this out loud?** If a sentence needs a breath, it's too long.
- [ ] **Is there a fact in here you didn't supply?** A number, a timeframe, a result. Cut it or check it.
- [ ] **Does it repeat your source word for word?** A little paraphrase is fine. A copy-paste is lazy and readers notice.
- [ ] **Do all five posts open the same way?** If so, ask for one new opening for each.
- [ ] **Are you happy to publish it under your name?** That's the standard. Nothing less.

IF IT ISN'T WORKING YET

If everything sounds the same, the source was too short. Give it a fuller transcript, not a summary. If the posts are too long, say "half that" and it will recalibrate. If the tone drifts, your voice file needs more samples. Ten short emails beat one long one.

WHERE YOUR HOURS COME BACK

What you get back here is the **Sunday evening**. The one where you meant to write five posts and instead watched a film and felt guilty. One source, five posts, one email, one FAQ, and it took the time it used to take to write a single caption. The bigger return is that you stop avoiding content altogether. It becomes a five-minute job between customers.

04

AGENT FOUR OF SEVEN

The Invoice Chaser Agent

> It writes the polite, escalating reminders for late invoices and keeps a plain list of who owes what, so you stop dreading the awkward email.

BUILD TIME	RUNS IN	YOU APPROVE
15 minutes	ChatGPT or Claude project	Every reminder

> **Rather not build it?** There's no dedicated invoice employee at Marblism. The closest is **Eva**, since these reminders go out from your inbox. See page 32.

THE JOB THIS REPLACES

An invoice goes past due. You know it, they know it, and neither of you mentions it. You open your accounting app, see the same red number, close the tab, and decide to deal with it next week.

The work is small. The **feeling** is large. Most owners over 40 were raised to be courteous about money, and chasing it feels rude. So the invoice sits there, and your cash flow quietly suffers while you're being polite.

This agent does the awkward part. It writes the reminder with the tone of somebody who assumes this is simply an oversight. You read it, approve it, send it. The relationship stays intact.

WHAT YOU NEED

- **A list of open invoices.** Export it from your accounting tool or type it out. Four columns: client, invoice number, amount, due date.
- **Your payment details and terms.** How you take payment, and what your late terms actually say. If you don't have terms, that's fine. We'll keep it friendly instead.
- **15 minutes** for the build. About a minute per reminder after that.

> *You did the work. Asking to be paid is not the awkward part of the job.*

THE 15-MINUTE BUILD

1. **Export or type your open invoices.** Don't include anything already paid. Half the embarrassment of chasing comes from chasing someone who already paid.
2. **Create a project called Invoice Chaser.** Paste the invoice table in as your first message so the agent has the live picture.
3. **Paste the instructions on the next page.** Notice the escalation ladder: day 1 past due, day 7, day 14, then a final notice. Each step gets slightly more direct and never gets rude.
4. **Ask it to sort by age.** Type **Who is most overdue?** Oldest first, because that's where the money is.
5. **Send one, update the row.** Change the status to "reminder 1 sent" with the date. The agent uses that to know which tone comes next, so it never sends reminder one twice.
6. **Set a weekly moment.** Same time every Friday, ten minutes. Consistency here is worth more than clever wording.

MAKE IT FIT YOUR BUSINESS

- **If you invoice monthly retainers:** add a column for the billing day and ask for reminders two days before the due date, not after. Permission beats apology.
- **If your customers are other businesses:** they expect a paper trail. Ask the agent to put the invoice number in the subject line, not just the body.
- **If a client is also a friend:** tell the agent so, in the chat, before it drafts. Then read the draft twice. Friendship deserves the extra minute.

TEST IT WITH THIS

> PROMPT ONE
>
> *Here is my table. Who is most overdue, and what step is each person on? Just the summary, no emails yet.*

> PROMPT TWO
>
> *Draft the reminder for the oldest one. Then rewrite it as if I've known this client for ten years and want to keep them.*

Comparing the two versions is useful. It shows you how much warmth you can keep while still asking clearly.

THE EXACT INSTRUCTIONS TO PASTE

COPY THIS INTO YOUR INSTRUCTIONS BOX

You are my accounts assistant. Your job is to help me ask for money that is already owed to me, without damaging the relationship.

I will keep a table: client, invoice number, amount, due date, and which reminder has already been sent.

When I ask, draft the next reminder for each overdue invoice, based on how many days past due it is. Step one, one to six days: assume it's an oversight, keep it light, two sentences. Step two, seven to thirteen days: name the invoice and the amount, ask if they need it resent. Step three, fourteen days or more: clear and businesslike, state the amount due and ask for a payment date. Step four, thirty days or more: firm, mention that work may pause on future jobs, still no anger.

Rules. Never threaten legal action. Never invent late fees unless I tell you my terms. Never use the words "kindly", "as per", or "urgent". Never apologise for asking. Always include the invoice number and the exact amount. Sign with my first name.

Output one email per invoice, labeled with the step number.

WHAT TO CHECK BEFORE YOU APPROVE

- [ ] **Is the amount exactly right?** Check against the invoice, not the draft.
- [ ] **Has this one already been paid?** Check your account before you send. This is the one mistake that is hard to walk back.
- [ ] **Is the step correct?** Sending step three to somebody on day two reads as aggressive.
- [ ] **Are the payment details right?** Wrong account numbers cost weeks.
- [ ] **Is there an apology in there?** Take it out. You did the work.

IF IT ISN'T WORKING YET

If a reminder feels too hard, drop it one step and send the softer version. If it's too soft, check the days-past-due figure. Most problems here are a wrong date, not wrong wording. And if you're dreading it, ask for the Gentle version, then add one sentence of your own.

WHERE YOUR HOURS COME BACK

The time here is **the Friday afternoon you stopped losing**, the one that used to disappear into avoidance. It's also the first agent where you may feel the difference in your bank balance rather than your calendar, because invoices that used to sit get asked about on schedule. And there is a personal return that is harder to describe: you stop being the person who is embarrassed to ask for what you earned.

05

AGENT FIVE OF SEVEN

The Front Desk Agent

> A chatbot trained only on your own documents that answers your customers' most repeated questions on your website, day or night, and hands anything complicated to a human.

BUILD TIME	RUNS IN	YOU APPROVE
15 minutes	A no-code chatbot tool	Every answer

> **Rather not build it? Rachel**, the Receptionist, covers the phone version of this job, and **Walter** builds the site the chat sits on. See page 32.

THE JOB THIS REPLACES

Every business has the same six questions. What are your hours. Do you deliver. How much is it roughly. Can you fit me in this week. Where are you based. Do you take cards.

You answer them by email, by phone, by text, and by direct message. The same six answers, dozens of times, always while you were doing something else. Meanwhile a customer who found you at 10pm on a Sunday read nothing and left.

This agent is a **front desk that never closes**. It answers only from what you give it. When it doesn't know, it says so and collects the customer's details for you.

WHAT YOU NEED

- **Your facts in one place.** A price list, a services page, an FAQ, your hours, your policies. Two to six documents is perfect. PDFs or plain text both work.
- **A no-code chatbot tool.** Any of the document-based ones. You upload your files and it builds the bot. This one costs a small monthly fee on most of them, unlike the first four, and I'd rather tell you now.
- **15 minutes** for the build, plus a real test conversation before it goes live.

One tool note that saves you a weekend. You may have seen tutorials that build this as a ChatGPT custom GPT. Don't start there: Custom GPTs are being retired in December 2026, and on some accounts new GPT creation is already closed. A document-based no-code chatbot tool, a Claude project, or a ChatGPT project with custom instructions all still work, and none of them get switched off.

THE 15-MINUTE BUILD

1. **Gather your five or six documents into one folder.** Use the versions you'd hand a new employee on their first day. If a page is out of date, delete it now rather than fixing it later.
2. **Create the bot and upload the files.** In your chosen tool, choose "create from documents" or "upload knowledge", then add the folder. Most tools finish indexing in a few minutes.
3. **Paste the instructions on the next page into the personality or system field.** Not into a chat window. The personality field is the one that applies to every conversation.
4. **Set the fallback.** Find the setting for unanswered questions or human handover and point it at your email address. This is the single most important setting on the page.
5. **Turn on the lead capture.** Ask for a name and an email before the conversation ends. A chatbot that collects nothing is a brochure.
6. **Test it in private for ten minutes.** Ask the six questions you always get. Then ask something you know it can't answer, and watch whether it admits it.

MAKE IT FIT YOUR BUSINESS

- **If you take bookings:** connect the bot to your booking page and let it hand over the link when someone asks about availability.
- **If you're in a regulated trade:** add a line to the instructions that the bot must never give advice, only process and policy. Then test that line hard.
- **If you're not ready to put it on your site:** keep it private for a week and use it yourself to answer customer emails. You'll learn what it gets wrong before your customers do.

TEST IT WITH THIS

> PROMPT ONE
>
> *What are your opening hours, and do you deliver to the next town?*

> PROMPT TWO
>
> *Can you do a job for me on the 30th for half the usual price, and can I pay you in cash without an invoice?*

That second one is the real test. A good bot says no politely and hands over. A bad one invents an answer. If it invents, tighten the "answer only from documents" line and test again.

THE EXACT INSTRUCTIONS TO PASTE

COPY THIS INTO YOUR BOT'S INSTRUCTIONS FIELD

You are the front desk assistant for my small business. You answer questions from customers on my website, day or night.

Answer only from the documents I uploaded. Do not use outside knowledge. Do not guess. If the answer is not in the documents, say: "I don't want to give you the wrong answer on that one. Let me pass you to a person," and then ask for their name, email, and a sentence about what they need.

Keep every answer under 60 words. Warm, plain, no jargon. Short sentences. No emoji. Never say you are an AI language model. If someone asks whether they are talking to a person, tell them honestly that you are the automated assistant and a human will follow up.

Never quote a price that is not in the documents. Never promise a date, a discount, or a delivery time. Never collect card details or passwords.

End answers with one short next step, such as "Would you like me to pass this to the team?"

WHAT TO CHECK BEFORE YOU APPROVE

- [ ] **Does every answer trace back to a document?** Ask it to quote the source. If it can't, the answer is a guess.
- [ ] **Are your prices correct and current?** Old prices on a bot are the most expensive mistake on this page.
- [ ] **Does it hand over cleanly?** Check that the handover email actually reaches you.
- [ ] **Are there private documents in the folder?** Contracts, staff notes, anything with a customer's details. Take them out.
- [ ] **Is there a way to reach a human on the page?** A phone number or email near the chat window. Always.

IF IT ISN'T WORKING YET

If it answers things that aren't in your documents, the instruction isn't being followed. Re-paste it into the personality field, not the chat. If it's slow to reply, remove the largest PDF. If a customer says it was unhelpful, read the transcript; the missing answer is usually a document you forgot to upload.

WHERE YOUR HOURS COME BACK

This agent gives you back the **interruptions**. Those two-minute answers that arrive while you're mid-job, mid-meal, or half asleep. They stop needing you at all, and the ones that do need you arrive as a tidy note with a name and an email attached. It also works hours you don't, which means Saturday night inquiries stop waiting until Monday morning to be seen.

06

AGENT SIX OF SEVEN

The Appointment & Intake Agent

> It takes a website inquiry, asks the three or four questions you'd ask, and books the call into your calendar, so you stop playing phone tag.

BUILD TIME	RUNS IN	YOU APPROVE
15 minutes	Your calendar + AI assistant	Every booking

> **Rather not build it?** Marblism's **Rachel** answers the call and books the appointment while you work. See page 32.

THE JOB THIS REPLACES

An inquiry comes in. You reply with a question. They answer two days later. You reply with two more questions. They go quiet, then come back on a Thursday when you're fully booked. Four emails, five days, and no appointment on the calendar.

This is the most frustrating kind of wasted time, because the person was **already interested**. They didn't need convincing. They needed a booking form that behaves like a person.

This agent asks your qualifying questions in one go, then drops a real time slot in your calendar. You get a prepared human instead of a half-finished thread.

WHAT YOU NEED

- **Your qualifying questions.** The three or four things you always end up asking. Write them down first. This is the only hard part and it takes five minutes.
- **A calendar you can share.** Google Calendar or Outlook. Both have a built-in booking page, which is the easiest way to do this without extra software.
- **15 minutes** for the build. A booking link takes two minutes after that.

WHY THIS ONE MATTERS MORE THAN IT LOOKS

Booking speed is the quiet advantage. The business that offers a time first usually gets the job. You don't need to be faster than everyone. You need to be faster than the version of you who checks email on Tuesday.

> *Every day an inquiry sits unanswered, someone else is offering a time.*

THE 15-MINUTE BUILD

1. **Write your four questions down.** Keep them short and answerable in one line. Budget, timeframe, location, and what they actually need cover most businesses.
2. **Turn on your calendar's booking page.** In Google Calendar it's called Appointment schedules. In Outlook it's Bookings. Both let you set open hours, meeting length, and buffer time between calls.
3. **Add your four questions to the booking form.** Right on the page where they pick a time. That's the trick. They give you the details at the moment they're motivated.
4. **Paste the instructions on the next page into a new project called Intake.** This one handles the email side: reading the inquiry and drafting the reply that sends people to the booking link.
5. **Add the booking link to your website contact page and your email signature.** Two places. That's it.
6. **Test it as a customer.** Send yourself an inquiry, go through the form, book a slot, and make sure it lands on your calendar with the answers attached.

MAKE IT FIT YOUR BUSINESS

- **If you do site visits:** add one question about access and parking. It saves an awkward phone call on the day.
- **If you're fully booked:** cap the bookings per week in your calendar settings, not in the email. A full calendar is only a good problem if it stops at the right number.
- **If you work alone:** block two hours a week with no bookings at all. The agent will happily fill every gap you leave open.

TEST IT WITH THIS

> PROMPT ONE
>
> *Here is a website inquiry. Draft the reply with my booking link, and tell me if you think this person is ready to book or just browsing.*

> PROMPT TWO
>
> *Now write the email for a customer who asked a question I can't answer yet. Keep it to three sentences and don't pretend I know the answer.*

That second version is the one you'll send most often. Honesty books more calls than a confident guess.

THE EXACT INSTRUCTIONS TO PASTE

COPY THIS INTO YOUR INSTRUCTIONS BOX

You are my intake assistant. I get website inquiries and I lose them in email threads. Your job is to turn each one into a booked call.

When I paste an inquiry, do three things. First, tell me in one line what kind of customer this is and whether they look like a good fit. Second, draft a short reply, four sentences maximum, that thanks them, answers their question in one line only if I have given you the answer, and invites them to pick a time using my booking link. Leave the link as [BOOKING LINK] so I can paste the right one. Third, list the three or four things I should ask before the call.

My standard questions are: what do you need done, what is your rough budget, when do you need it by, and where are you located. Use these unless the inquiry clearly makes one irrelevant.

Never promise a specific appointment time. Never quote a price. Never say the slot is confirmed. Tone: friendly, brief, professional, no pressure and no sales language.

WHAT TO CHECK BEFORE YOU APPROVE

- [ ] **Is the booking link working?** Click it yourself once a week. Expired links cost you real customers.
- [ ] **Are the questions the right ones?** If you never use the budget answer, delete that question. Every extra question loses a booking.
- [ ] **Did it promise a time?** The customer picks the time. The agent must never offer one.
- [ ] **Did the answers arrive with the booking?** Check your calendar entry, not just your inbox.
- [ ] **Is there a real person's email in the reply?** Some people will always reply to the email instead of booking. Give them somewhere to land.

IF IT ISN'T WORKING YET

If the reply doesn't get a booking, the booking link is probably buried. Put it in the first sentence. If people ignore the questions, you have one too many. Cut to three. If a booking arrives with empty answers, the form fields saved but didn't attach, so check your calendar integration.

WHERE YOUR HOURS COME BACK

You get back the **thread**. Four messages over five days becomes one message and a booked time. Add those up and it's most of a Friday morning. The better return isn't the time, though. It's that inquiries stop going cold, which means the hours you already spent marketing start paying you properly.

07

AGENT SEVEN OF SEVEN

The Review & Reputation Agent

> It drafts the thank-you and review request for happy customers, and calm, professional replies to the reviews that sting.

BUILD TIME	RUNS IN	YOU APPROVE
15 minutes	ChatGPT or Claude project	Every message

> **Rather not build it?** Reviews aren't a separate employee at Marblism. **Sonny** runs your social presence, which is where most reviews get asked for. See page 32.

THE JOB THIS REPLACES

Two very different chores, both emotional.

The first: a job goes well, the customer is delighted, and you mean to ask them for a review. You mean it for about six days. Then the moment passes and you both move on. The happy reviews you never asked for are the cheapest marketing you will ever lose.

The second: a three-star review arrives, slightly unfair, and your first draft reply is written at 11pm by a hurt person. You know you shouldn't send that one. But you don't know what you should send either, so you send nothing.

This agent handles both, in **your voice, not a lawyer's**.

WHAT YOU NEED

- **Your review link.** The direct link to leave a Google review, or wherever you collect them.
- **Your AI assistant** in a project called Reviews, with your voice file attached.
- **15 minutes** for the build. Two minutes per message after that.

> *You cannot control what people write. You can control what you answer.*

THE 15-MINUTE BUILD

1. **Get your direct review link.** In Google Business Profile, find the "ask for reviews" button and copy the short link. Save it in your project as text.
2. **Paste the instructions on the next page.** Look at the "never" section carefully. It's what stops the replies sounding corporate.
3. **Make a simple habit.** When a job finishes well, open the project, type the customer's first name and what you did, and let it draft. Then paste the message into your send.
4. **Add the review link to the thank-you.** Do it in the same message. "If you have a minute, this link goes straight to my Google page." Simple as that.
5. **For a rough review, wait an hour before you look at the draft.** Then read it with calmer eyes. Only then decide.
6. **Never let this agent post anything.** It drafts. You post. Every time, without exception.

MAKE IT FIT YOUR BUSINESS

- **If you're a tradesperson:** ask for the review the same day you finish, while the clean garden or new kitchen is still fresh in their mind.
- **If you sell online:** put the review request in the delivery follow-up email, three or four days after the parcel arrives.
- **If you get a review that names a staff member:** take the reply offline. Never discuss a person in public, even kindly.

TEST IT WITH THIS

> PROMPT ONE
>
> *Customer: Maria. Job: full garden clear-up, three days, took away all the green waste. Write the review request.*

> PROMPT TWO
>
> *Here is a three-star review. What is the real complaint underneath it? Then draft the reply, and tell me honestly whether I should reply at all.*

Some reviews are better left alone. Asking the agent that question out loud helps you decide with your head instead of your chest.

THE EXACT INSTRUCTIONS TO PASTE

COPY THIS INTO YOUR INSTRUCTIONS BOX

You write two kinds of message for my small business: review requests, and replies to reviews.

For a review request: I will give you a customer's first name and what work I did. Write four sentences. Thank them specifically, mention the job in concrete terms, ask for a review in a low-pressure way, and include [REVIEW LINK] where the link goes. Never offer anything in exchange for a review. Never say "5 stars". Never imply the review is expected.

For a reply to a review: I will paste the review. First tell me in one line what the real complaint is. Then draft a reply of three or four sentences that thanks them for the feedback, addresses the specific point, and says what I will do differently. For a good review, keep it to two sentences and warm.

Rules. No defensiveness. No excuses. Never argue with a fact. Never name staff. Never offer a refund in public; move it to a private conversation instead. Plain English, no corporate phrases. Sign with my first name.

WHAT TO CHECK BEFORE YOU APPROVE

- [ ] **Is the review link correct?** Wrong link, lost review.
- [ ] **Is the job described accurately?** Don't let a good sentence invent details you didn't do.
- [ ] **Is there any reward offered?** Even a hint of one can breach platform rules. Take it out.
- [ ] **Does the reply to a bad review argue?** If it defends, rewrite it. The reader is the next customer, not the reviewer.
- [ ] **Are you calm?** If not, save the draft and come back tomorrow.

IF IT ISN'T WORKING YET

If the request sounds like a sales pitch, cut the adjectives and keep the thanks. If a reply to a bad review reads defensively, remove the word "but" and try again. If nothing comes back that you'd send, write your own first two lines, paste them in, and ask the agent to finish your version.

WHERE YOUR HOURS COME BACK

You get back the **eleven o'clock at night**. The hour you used to spend re-reading a bad review and writing replies you'd never send. And you gain something that doesn't show on a timesheet: a steady trickle of reviews you would never have asked for, arriving while you were busy doing the work people are reviewing.

THE WEEKEND PLAN

Two days, seven agents

The build times are honest. Fifteen minutes sets an agent up. Most then need ten or fifteen minutes of testing before you trust them with a real job. That's why the column says 15 to 30.

WHEN	WHAT YOU BUILD	TIME
Saturday morning	**Coffee, phone face down.**	
9:00	**The Morning Inbox Agent.** Create the project, paste the instructions, add your voice file, test on five old emails.	25 min
9:25	**The Follow-Up Agent.** Build the log, paste the instructions, draft your first nudge for a real customer.	25 min
9:50	Stop. Close the laptop. Two agents before ten in the morning.	5 min
Saturday afternoon	**One agent, then out.**	
2:00	**The Content Multiplier Agent.** Pick one thing you already made. Paste the transcript. Run it once.	30 min
2:30	Save the posts that worked. You'll use them as examples next week.	5 min
Sunday morning	**The money ones.**	
9:00	**The Invoice Chaser Agent.** Export your open invoices, paste the instructions, send one reminder.	25 min
9:25	**The Front Desk Agent.** Upload your documents, paste the instructions, set the handover, test six questions.	30 min
Sunday afternoon	**Finish, then prove it works.**	
2:00	**The Appointment & Intake Agent.** Turn on your booking page, add your four questions, test as a customer.	25 min
2:25	**The Review & Reputation Agent.** Get your review link, paste the instructions, draft one request and one reply.	20 min
2:45	**Test everything with one real job.** Take one job from this week and run it through all seven, start to finish. You'll find two things to fix and one agent you'll never use. Both are useful.	30 min

BEFORE SATURDAY

Gather five things, then stop

You can do this on the morning of, but it's calmer if you gather it first. Twenty minutes on Friday evening saves you from hunting for files with a coffee going cold.

- [ ] **Three or four emails you wrote yourself.** The ones that sound like you talking. Save them in one plain document called **my-voice**. Every agent uses this.
- [ ] **A list of open quotes and unpaid invoices.** Export it, or type it into a spreadsheet with names, amounts, and dates. Rough is fine.
- [ ] **One thing you already made.** A video, a voice note, a blog post, or a long email you're proud of. This becomes a week of content.
- [ ] **Your facts in one folder.** Prices, hours, services, policies. The material you'd hand a new employee on day one.
- [ ] **One real job from this week.** A real inquiry, a real invoice, a real customer question. You'll use it for the final test.

What you don't need

You don't need to learn to code. You don't need a new computer. You don't need a website redesign, a marketing plan, or a business name for the agent. You don't need to understand how any of it works underneath.

You need a plain document, an hour of quiet, and the willingness to let the first version be a bit clumsy. **That's the whole entry fee.**

IF YOU ONLY HAVE ONE HOUR THIS WEEKEND

Do **Agent 1, The Morning Inbox Agent**. Nothing else. It's the one that gives you back time before you've finished your coffee, and it's the one that makes you believe the rest is possible.

Then next weekend, do Agent 2. One a weekend is seven weeks, which is still less than a season. **You are not behind.**

YOUR FIRST WEEK WITH THE TEAM

What the first week actually feels like

Monday will feel slower, not faster

This surprises people. You built seven agents in a weekend, so Monday should be effortless. It won't be.

Reading drafts is still work. At first it's *more* work than writing from scratch, because your brain has to check someone else's sentences. That passes, usually within a week of daily use.

You will rewrite the first draft of everything

That's normal, and it's not a sign the agent is bad. It's a sign you have taste. You'll rewrite less each week, and by the third you'll send most drafts with one small change.

One agent will disappoint you

Out of seven, one won't fit how you work. Maybe your customers don't use your website. That's fine. **Delete it and keep the other six.** Six working agents is a very good weekend.

What "normal" looks like

You'll know it's working when you stop opening a tool to check on it. The first week you check constantly, the way you check a new hire. Then one day you realise you haven't thought about the Follow-Up Agent at all, and three quotes went out anyway. That quiet is what you were building.

THE ONE RULE THAT PROTECTS YOU

For the first two weeks, no agent sends anything unsupervised. Not one email, not one post, not one review reply. Everything waits for your yes.

This isn't because the tools are dangerous. It's because you don't yet know their failure patterns, and they don't know your exceptions. Two weeks of supervised use teaches you both. After that, you may choose to let one low-risk thing run on its own, and you'll choose it with evidence instead of hope.

Keep one small habit

Once a week, open each agent and read its last few outputs. Five minutes total. You'll catch drift before a customer does. Agents, like people, get a little sloppy when nobody's watching.

WHAT TO BUILD NEXT

Your eighth agent is already obvious

The seven in this book aren't a complete list. They're the seven that most small businesses need first. Once you've built one, you'll start noticing chores that have exactly the same shape.

The three rules don't change, no matter what you dream up:

- **Zero coding.** If it needs code, it isn't the right project for a weekend.
- **Human in the loop.** Drafts, not sends. Suggestions, not decisions.
- **Fifteen minutes.** If the build needs a day, it's not one agent. It's three, and you should build them one at a time.

How to choose the next one

Don't brainstorm. Watch yourself instead. On Monday morning, notice the first task that makes you sigh. Not the hardest task, the *sighing* one. That's your eighth agent.

Then ask three questions about it. Does it involve text I could describe to a person in a paragraph? Does it repeat in roughly the same shape every time? Would a careful draft be worth more to me than no draft at all? Three yeses and you have your build.

Things other owners build next

- A **quote writer** that turns your notes from a site visit into a first draft of a quote.
- An **onboarding agent** that writes the welcome email, the what-to-expect note, and the first-week checklist for every new client.
- A **meeting summariser** that turns a recorded call into three decisions and four action points.
- A **job description writer** for the day you finally hire help.

One caution, said kindly. Don't build an agent for something you don't yet understand yourself. If you can't write the instructions in plain English, the problem isn't the tool. It's that the process needs deciding first. Decide it on paper, then build.

ONE HONEST RECOMMENDATION

If you'd rather not build it yourself

Everything in this book assumes you want to own the setup. You paste the instructions, you approve the drafts, and the agents live in tools you are already paying for. That is the cheapest way to start, and it is the way I would start.

But some people read a book like this and think: I don't want seven more tabs to manage. I want the team already hired. If that is you, there is one platform I use and recommend, and it is called **Marblism**.

What it actually is

It does roughly what this book teaches, except the agents arrive already built. You get a team of AI employees who own jobs rather than tasks: one for your inbox and calendar, one for your phone, one for leads and follow-up, one for social media, one for your website, one for SEO articles, and one for contracts.

They share one record of your business, so a detail somebody mentions on a call is already there when the next one writes the follow-up. You still approve the work. The human-in-the-loop rule does not disappear just because the tool is bigger.

What it costs, plainly

It is not free and I would not pretend otherwise. Paid plans start in the tens of dollars a month, which is a fraction of what an admin hire costs but still real money for a small business. Their pricing changes, so check the current numbers yourself before you sign up, and there is a refund window if it turns out not to be for you.

HAVE A LOOK

See the AI team at Marblism

If you want to compare it to what you just built, the site shows every AI employee and what job each one owns.

marblism.com?via=telley-taylor

A disclosure, because it matters. That link is an affiliate link. If you sign up through it, I earn a commission at no extra cost to you, and it helps keep guides like this one free. I recommend Marblism because I build with it, not because of the commission. If you would rather not use my link, type marblism.com into your browser directly and everything works exactly the same.

COMMON WORRIES, ANSWERED

Six things you're probably thinking

I've taught a lot of beginners, and the same six worries come up almost every time. None of them are silly. All of them have a straight answer.

Do I need to be technical?

No. If you can write an email and copy a block of text, you can do every build in this book. There is no code anywhere, and no settings page you have to understand first.

What if it writes something wrong?

It will, eventually, and that is exactly why you approve everything. You are the last pair of eyes before anything leaves your business, which means a wrong draft is a typo you catch, not a mistake your customer sees.

Is my customer data safe?

Treat these tools the way you would treat any new employee. Give them what they need for the task and nothing more. Do not paste card numbers, passwords, or medical details, and check whether your tool's settings let it use your conversations for training. Most paid plans let you switch that off.

Will it sound like a robot?

Not if you give it your own writing to copy from. That is why every chapter asks for a voice file. The first drafts still need a light edit, and after a week or two you will barely touch them.

What does it cost?

Agents 1, 2, 3, 4, 6 and 7 run inside a free account, and cost nothing extra beyond the assistant you choose. Agent 5, the website chatbot, usually needs a small paid plan because it lives on your site all day. Start free, and only pay when an agent has earned it.

What if I get stuck?

Ask the tool itself. Type "I'm stuck, here's what happened," paste what's on your screen, and it will usually walk you through it. And if you'd rather watch it done once, the video tutorials at telleytaylor.com cover the same builds step by step.

One more worry, since it's on your mind

"What if the tool changes or gets shut down?" It happens, and it is worth planning for. That is why the builds in this book sit on tools that are not going anywhere soon, and why I told you plainly that ChatGPT custom GPTs are being retired in December 2026 instead of teaching you to build one.

The protection is simple. Keep your prompts and your voice file in a document on your own computer. If you ever move to a different tool, you paste the same instructions into the new one and you are running again inside fifteen minutes.

Your instructions are the asset. The tool is just where they live.

A LAST WORD

You didn't need to become technical. You needed help.

When you started your business, nobody handed you a manual for the admin. You learned it by doing it, badly at first, and then well enough. That's the same way you'll learn this.

You won't get the instructions perfect on the first try. The first draft from any of these agents will sound a little stiff, and you'll cut a sentence and add one of your own and it will be fine. That's not a failure of the tool. That's how it's supposed to go.

What matters is that on Sunday night you'll have seven things working for you that weren't working on Friday. And on Monday, the inbox will be sorted before you finish your coffee.

Start with one agent. That's the whole secret.

Talk soon,
Telley

WHERE TO GO NEXT

See it built once, then build your own

The free step-by-step video tutorials at **telleytaylor.com** walk through the same tools used in this book, at a pace that assumes you've never opened them before.

You'll find guides on **ChatGPT custom instructions**, **Claude projects**, **no-code chatbots you can put on your website**, and **prompt engineering for beginners**. Each one is short, and each one ends with something you can actually use. New guides also go out on Substack: **telleytaylorchatbots.substack.com**.

Go to telleytaylor.com and pick the tutorial that matches the agent you want to build next.

And if you would rather have the team hired for you than built by you, turn back one page to the Marblism recommendation.

And if something in this book didn't work, or a step didn't make sense, reply to the email that delivered it. I read those, and a real answer comes back. Your question is probably the one three other people were too polite to ask.