

The AI Workflow Catalyst

Your Personalized AI Integration Plan: **Part One**

Business-building Toolkit Session

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Why This Session Is in the Toolkit?

Incorporating AI into your workflow can drastically improve your productivity and scale your creativity

Let's address the false choice

**Think of AI as a tool,
not a replacement**

Why the AI Workflow Catalyst is effective:

- Aligns with the way you're already working
- The popular advice of memorizing and/or copying and pasting prompts is not practical
- My approach is much more organic and aligned with how we think and solve problems
- It helps you gain clarity faster and become a better critical thinker
- It's repeatable and will lead you to many other use-cases and helpful discoveries

Relies on Chain of Thought (CoT) reasoning

- CoT is the order of operations you use to reason through a problem
- Humans break down challenging problems into smaller, more manageable pieces
- CoT reasoning and prompting forces you to talk through the problem with yourself and with the AI
- Have you ever talked through a problem with a friend? Or unpacked it by writing in your journal? Same thing!
- It's repeatable and will lead you to many other use-cases and helpful discoveries

The Workflow Catalyst uses
procrastination and creative blocks
as its main trigger

The AI Workflow Catalyst

The AI Workflow Catalyst

1. Recognize when you're stuck or procrastinating
2. Ask yourself why
3. What would be a dream-come-true scenario for me?
4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:
5. Look at the results. Then ask yourself one or more self-reflection questions:
 - What's good here?
 - What could be better?
 - What's missing?
 - What ideas surfaced that I didn't expect?
 - How can I dive in a little deeper?
 - How can I build on this?
 - What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?
6. Use your answers to these questions to prompt the AI further so it can help you find better answers, solutions, ideas

IMPORTANT:

**Start the process yourself.
Do some good thinking up front.
THEN engage AI.**

Sample use cases for the AI Workflow Catalyst

Sample use cases

1. Ideation and Brainstorming
2. Outlining and Organizing Ideas
3. Editing and Proofreading
4. Headline and Title Creation
5. Research
6. Synthesis
7. Content Repurposing
8. Analyzing Data and Trends
9. Project Planning and Mapping
10. Problem-Solving and Stress-testing Potential Ideas

Use case example #1: Ideation & Brainstorming



How AI can help:

AI can assist in the ideation and brainstorming process by generating new ideas, perspectives, and concepts based on input keywords, trends, and existing content. It uses natural language processing and machine learning algorithms to understand patterns and suggest innovative ideas tailored to commercial content creation.

Some examples of AI's application here:

- Generating a list of potential blog post topics based on current industry trends and target audience interests.
- Providing alternative angles or approaches to a marketing campaign.
- Suggesting catchy taglines or slogans for product launches.
- Headline and title development (articles, books, white papers, etc.)
- Creating content calendars with diverse themes and topics for social media campaigns.

Benefits of incorporating AI here:

- **Enhanced Creativity:** AI tools can inspire creativity by presenting unique and diverse ideas, helping writers overcome creative blocks.
- **Efficiency:** Quickly generates a multitude of ideas, saving time that would otherwise be spent on extensive brainstorming sessions.
- **Trend Awareness:** Keeps writers updated with current trends and popular topics, ensuring that their content is relevant and timely.
- **Diverse Perspectives:** Offers different viewpoints and angles, enriching the content with varied perspectives that might appeal to a broader audience.

Scenario:

Jamie is a freelance content marketing writer tasked with creating a content calendar for a new skincare brand's blog. Jamie has been struggling to come up with fresh and engaging blog post ideas that will attract and retain the brand's target audience.

Step-by-step protocol:

1. Recognize and acknowledge that you're stuck or procrastinating:

Jamie sits at the computer, staring at a blank document. Frustrated, Jamie realizes that hours have gone by without any progress. She suddenly remembers that this is one of the triggers for the AI Workflow Catalyst.

2. Ask yourself why:

Jamie reflects and identifies that she's currently stressed about the rapidly approaching deadline on this project. She's also dealing with a personal relationship issue that's keeping her distracted.

3. What would be a dream-come-true scenario for me right now?

Jamie imagines having a list of compelling, trend-driven blog post ideas that resonate with the target audience and align with the brand's voice and marketing goals.

Step-by-step protocol (cont.)

- 4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:**

Jamie decides to have a conversation with herself to clarify the context and question:

“You’re an expert content marketing professional. Give me blog post ideas and innovative angles for a new skincare brand targeting women aged 25-40 who are interested in natural and sustainable beauty products. I’ve listed a few below that I’ve already come up with. What other trending topics and innovative angles would you suggest?”

Step-by-step protocol (cont.)

5. Look at the results. Then ask yourself one or more self-reflection questions:

Jamie first reviews the AI-generated ideas:

- *"Top 10 Natural Skincare Ingredients You Need to Know About"*
- *"How to Build a Sustainable Skincare Routine"*
- *"The Benefits of Organic Skincare Products"*
- *"DIY Skincare Recipes with Ingredients from Your Kitchen"*

Step-by-step protocol (cont.)

What's good here?

The topics are relevant and align with the brand's focus on natural and sustainable beauty.

What's missing?

A unique perspective or angle that differentiates the brand from competitors.

What haven't I thought of?

Highlighting personal skincare journeys or challenges faced by the target audience.

What could be better?

Adding more specific trends or data-driven insights.

Step-by-step protocol (cont.)

What ideas surfaced that I didn't expect?

The DIY skincare recipes idea is intriguing and could engage the audience.

How could I dive a little deeper?

Research current trends in sustainable skincare and incorporate them into the content.

How can I build on this?

Create a series of posts around DIY skincare with a focus on sustainability.

What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?

I could prompt the AI with: "What are the latest innovations in natural skincare that the brand can highlight?"

Step-by-step protocol (cont.)

6. Use those questions to create a new prompt to get you close to what you need:

Jamie inputs a new prompt:

"Can you provide the latest trends and innovations in natural skincare that can be highlighted in blog posts? Also, suggest how to highlight personal skincare journeys or challenges faced by the target audience."

7. Repeat steps 5 and 6 as needed:

Jamie reviews the new AI-generated ideas, finds them more detailed and aligned with the brand's voice, and continues refining the content calendar by iterating on the prompts and AI feedback until she develops a more comprehensive and engaging content plan.

Use case example #2:

Outlining & Organizing Ideas



How AI can help:

AI can assist in outlining and organizing ideas by providing structure to content, ensuring logical flow, and helping to prioritize key points. It uses algorithms to analyze the content and suggest the most coherent and effective way to present information.

Some examples of AI's application here:

- Creating detailed outlines for long-form content such as whitepapers or ebooks.
- Structuring a piece to ensure it covers all relevant points in a logical order.
- Organizing key points and subpoints for a presentation or webinar script.
- Suggesting a sequence for a series of related articles to maintain reader engagement.
- Recommending possible sequence structures for a 90-day content plan.

Benefits of incorporating AI here:

- **Improved Structure:** AI tools help in creating well-organized content that is easy to follow, enhancing readability and comprehension.
- **Time-saving:** Quickly generates comprehensive outlines, reducing the time spent on planning and structuring content.
- **Consistency:** Ensures that the content follows a logical flow, maintaining consistency throughout the piece.
- **Focus on Key Points:** Helps writers prioritize and emphasize the most important points, making the content more impactful.

Scenario:

Alex is a freelance marketing consultant and writer tasked with writing a comprehensive ebook for a client in the B2B tech industry. The ebook aims to educate potential customers on the benefits of their new software solution. Alex is struggling to structure the content in a way that flows logically and covers all the necessary points without overwhelming the reader.

Step-by-step protocol:

1. Recognize and acknowledge that you're stuck or procrastinating:

Alex realizes that despite having gathered a wealth of information, progress on the ebook has stalled. He feels overwhelmed and creatively stuck.

2. Ask yourself why:

Alex reflects and identifies that the sheer volume of information is overwhelming. The client flooded Alex with background materials and SME interviews. As a result, the content feels disorganized. And he's unsure about how to logically sequence the content to maintain reader engagement.

3. What would be a dream-come-true scenario for me right now?

Alex imagines having a clear, detailed outline that logically organizes all the key points, making the writing process straightforward and ensuring the ebook flows seamlessly from one section to the next.

Step-by-step protocol (cont.)

4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:

Alex decides to have a conversation with himself to clarify the context and question. He takes that conversation to an AI tool, using the following prompt:

“You’re a world-renowned B2B marketing consultant. I need a detailed outline for an ebook on the benefits of a new B2B software solution. The ebook should cover the following: an introduction to the software, its key features, benefits for businesses, case studies, implementation steps, and a conclusion. Below is a very disorganized outline I’ve cobbled together. How can I structure these points logically and effectively?” [Insert existing rough outline here]

Step-by-step protocol (cont.)

5. Look at the results. Then ask yourself one or more self-reflection questions:

Alex first reviews the AI-generated ideas. He can quickly tell that it's MUCH better and flows way more logically than his messy outline. But it's maybe 80% there. It still needs a bit of work.

Step-by-step protocol (cont.)

What's good here?

The outline covers all the necessary points and presents them in a logical order.

What's missing?

Additional sections on potential challenges and solutions during implementation.

What haven't I thought of?

Including a FAQ section to address common concerns and questions.

What could be better?

Providing more detailed subpoints under each main section to guide the writing process.

Step-by-step protocol (cont.)

What ideas surfaced that I didn't expect?

The idea to include a FAQ section for added value.

How could I dive a little deeper?

Expanding each section with specific subtopics and examples.

How can I build on this?

Adding an introduction to each major section to explain its relevance and importance.

What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?

What are the most common challenges accounting firms and other similar professional services firms face when implementing new software, and how can these be addressed?

Step-by-step protocol (cont.)

6. Use those questions to create a new prompt to get you close to what you need:

Alex inputs a new prompt:

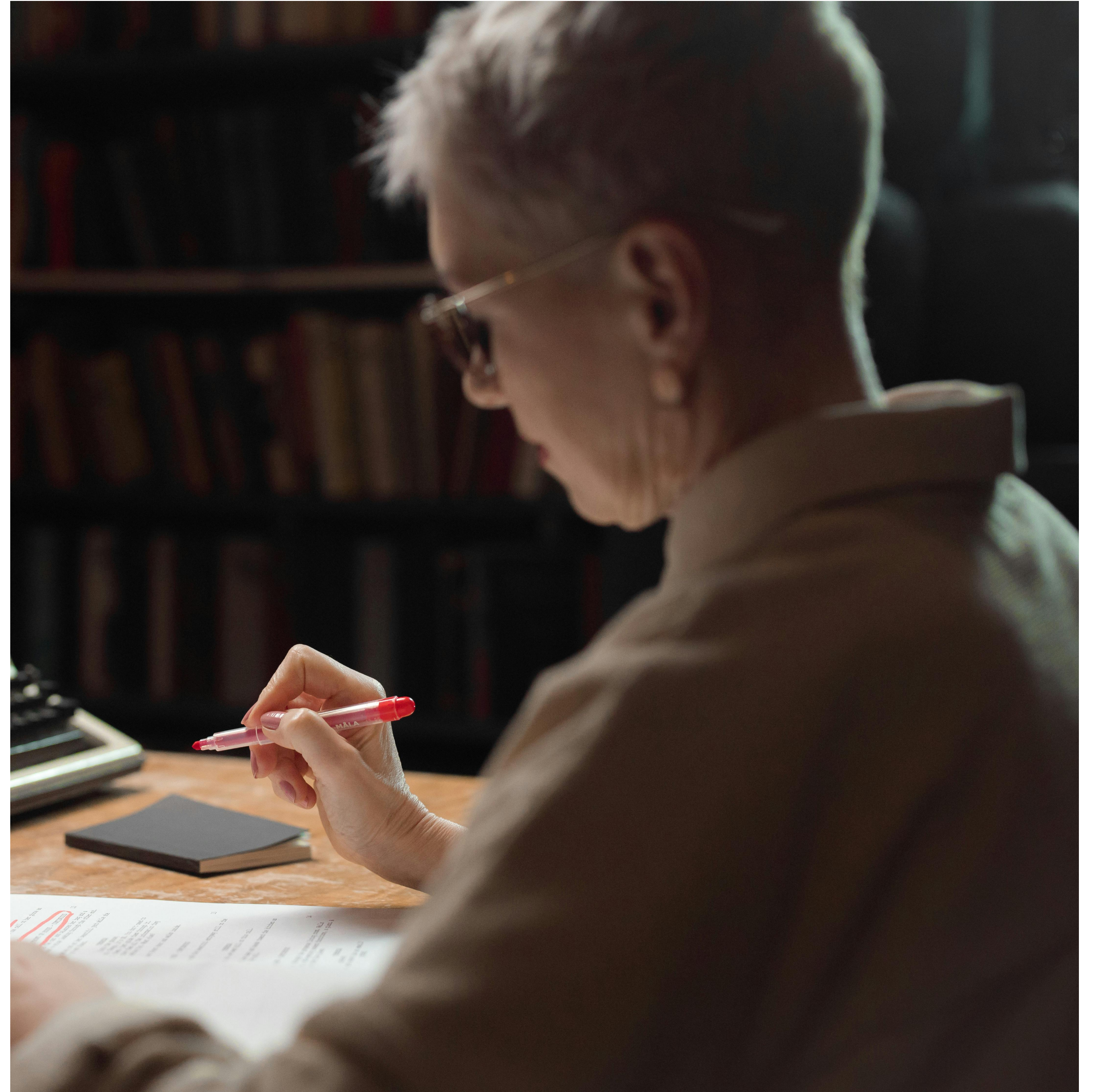
"Can you provide a detailed outline for an ebook on the benefits of a new B2B software solution, including sections on potential implementation challenges and solutions for accounting firms and other similar professional services firms, and a FAQ section to address common concerns? Here is the current outline I'm working with for context." [Insert updated outline]

7. Repeat steps 5 and 6 as needed:

Alex reviews the new AI-generated outline, which now includes additional sections on challenges and FAQs, and continues refining the content structure by iterating on the prompts and AI feedback until he develops a comprehensive and detailed outline he's very happy with.

Use case example #3:

Editing & Proofreading



How AI can help:

AI can assist in the editing and proofreading process by catching grammatical errors, suggesting style improvements, and ensuring consistency. It leverages natural language processing and machine learning algorithms to analyze the text for common mistakes, readability, tone, and overall coherence, making it a valuable tool for refining content.

Some examples of AI's application here:

- Identifying and correcting grammatical errors.
- Suggesting improvements to sentence structure and word choice to enhance readability.
- Ensuring consistency in tone and style across different sections of a long-form document.
- Checking for adherence to specific style guides, such as AP or Chicago Manual of Style.
- Highlighting passive voice and suggesting active alternatives to strengthen the writing.
- Helping you break the bad habit of editing while you write, knowing that the AI can help you “fill in the blanks” later, during the editing stage.

Benefits of incorporating AI here:

- **Improved Accuracy:** AI tools help catch errors that may be overlooked during manual proofreading, ensuring high-quality, polished content.
- **Time-saving:** Quickly scans and analyzes large amounts of text, significantly reducing the time required for editing and proofreading.
- **Consistency:** Ensures a consistent tone and style throughout the document, enhancing the overall cohesiveness of the content.
- **Enhanced Readability:** Suggests improvements to make the content clearer and more engaging for the target audience.
- **Improved Writing Speed:** Breaking the habit of editing while you write can help keep you in a flow state for longer, saving you time and improving work quality.

Scenario:

Emma is a freelance copywriter working on a comprehensive white paper for a B2B client. The whitepaper aims to provide in-depth insights into the latest trends in digital transformation. Emma has completed the draft but is struggling to refine the content, ensuring it is polished, coherent, and free from errors.

Step-by-step protocol:

1. Recognize and acknowledge that you're stuck or procrastinating:

Emma sits at her desk, feeling overwhelmed by the sheer length and complexity of the white paper. She acknowledges that she's been putting off the editing process due to its daunting nature.

2. Ask yourself why:

Emma realizes that the white paper is dense and technical. That's the source of her procrastination. It just feels challenging to edit for clarity and readability. She's also concerned about missing subtle grammatical errors and inconsistencies.

3. What would be a dream-come-true scenario for me right now?

Emma imagines having a polished, error-free white paper that avoids passive voice, maintains a consistent tone and style, with all technical jargon clearly explained and the overall content engaging and easy to understand.

Step-by-step protocol (cont.)

- 4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:**

Emma decides to have a conversation with herself and to clarify the context and question. She takes that conversation to an AI tool, using the following prompt:

“You’re an expert-level editor. I need you to edit the white paper draft below. The content should be free from grammatical errors, avoid passive voice, have a consistent tone, and be engaging and easy to understand. How can I refine this document to meet these standards?” [White paper draft inserted here]

Step-by-step protocol (cont.)

5. Look at the results. Then ask yourself one or more self-reflection questions:

Emma reviews the AI-generated suggestions and corrections:

- *The AI highlights grammatical errors and suggests corrections.*
- *It provides alternative phrasing to improve readability.*
- *It also identifies areas where the tone is inconsistent and suggests adjustments.*
- *It highlights complex jargon and suggests simpler alternatives or explanations.*

Step-by-step protocol (cont.)

What's good here?

The AI has caught numerous grammatical errors and suggested clearer phrasing.

What's missing?

The AI could provide more specific suggestions for maintaining a consistent tone. I'll need to point that out to my editor.

What haven't I thought of?

Including a glossary of terms for the technical jargon to aid reader comprehension.

What could be better?

Not all of the AI suggestions enhance the engagement level of the content. Some suggestions are too wordy or don't quite match the style I'm going for.

Step-by-step protocol (cont.)

What ideas surfaced that I didn't expect?

The idea to add explanations for complex terms directly within the text.

How could I dive a little deeper?

Reviewing the AI's tone consistency suggestions more thoroughly.

How can I build on this?

Incorporating the AI's feedback into a second draft and running it through the AI tool again for further refinement.

What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?

How can I ensure the tone remains professional yet engaging throughout the document?

Step-by-step protocol (cont.)

6. Use those questions to create a new prompt to get you close to what you need:

Emma inputs a new prompt:

"Can you refine this white paper on digital transformation trends to ensure a professional yet engaging tone, while also providing suggestions for explaining technical terms more clearly and maintaining consistency throughout?"

7. Repeat steps 5 and 6 as needed:

Emma reviews the new AI-generated edits, finding them more aligned with her needs, and continues refining the white paper by iterating on the prompts and AI feedback until the document is polished, coherent, and engaging.

Bonus use case for editing:

Breaking the habit of editing while you write by inserting placeholders in your draft whenever you're stuck. That way you can keep writing, stay in a flow state, and worry about those placeholders later.

Original draft:

"One reason why accounting firms struggle with a new software implementation is the [something about how their production schedule is very intense during many parts of the year]."

Additionally, the complexity of the software itself can be a significant barrier. Training staff to use new tools requires time and resources that firms may not have readily available. Furthermore, resistance to change among employees can hinder the adoption of new systems. Finally, the need to maintain high levels of accuracy and compliance during the transition period can add to the overall challenge."

Prompt:

“Fill in all the bracketed placeholders you see in the draft. Those are areas where I was having trouble coming up with the right words to use. I need you to help me come up with content for those placeholders using the direction I provided inside the brackets.”

AI-updated draft:

"One reason why accounting firms struggle with a new software implementation is the **nature of their production schedule, which is particularly intense during tax season and quarterly reporting periods, leaving little room for additional training and system changes.**

Additionally, the complexity of the software itself can be a significant barrier. Training staff to use new tools requires time and resources that firms may not have readily available. Furthermore, resistance to change among employees can hinder the adoption of new systems. Finally, the need to maintain high levels of accuracy and compliance during the transition period can add to the overall challenge."

Use case example #4: Headline & Title Creation



How AI can help:

AI can assist in the creation of compelling headlines and titles by analyzing the content, target audience, and current trends to suggest engaging and relevant options. It leverages natural language processing and machine learning algorithms to generate headlines and titles that capture attention, convey the intended message, and drive engagement.

Some examples of AI's application here:

- Generating attention-grabbing headlines for sales letters, sales pages, and landing pages.
- Suggesting subheadlines within a long-form content piece to maintain reader engagement.
- Creating strong titles for books, white papers, reports, and lead magnets that resonate with the target audience.
- Providing variations of headlines and titles to A/B test for optimal performance.

Benefits of incorporating AI here:

- **Enhanced Creativity:** AI tools can generate a variety of headline and title options, sparking creativity and helping writers overcome mental blocks.
- **Efficiency:** Quickly generates multiple headline and title options, saving time and effort in the creative process.
- **Optimization:** Suggests headlines and titles that are optimized for SEO, increasing the visibility and discoverability of the content.
- **Engagement:** Helps create headlines and titles that are more likely to capture attention and engage the target audience.
- **Testing:** Provides multiple options for A/B testing, enabling writers to choose the most effective headline or title based on performance data.

Scenario:

Mark is a freelance copywriter working on a lead magnet for a client in the health and wellness industry. The lead magnet is an ebook titled "10 Steps to a Healthier Lifestyle." Mark is struggling to create a compelling title for the ebook and engaging headlines for the associated landing page that will attract and convert visitors. The target audience is adults over 65.

Step-by-step protocol:

1. Recognize and acknowledge that you're stuck or procrastinating:

Mark sits at his desk, realizing that he's been staring at a bunch of potential title ideas for an hour. He can't seem to make a decision.

2. Ask yourself why:

None of the title ideas he's come up with are calling out to him. He feels pressure to create something catchy and impactful but is unsure how to encapsulate the value of the ebook in just a few words.

3. What would be a dream-come-true scenario for me right now?

Mark imagines having a list of captivating titles and headlines that clearly communicate the benefits of the ebook and entice readers to download it.

Step-by-step protocol (cont.)

4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:

Mark decides to have a conversation with himself and to clarify the context and question. He takes that conversation to an AI tool, using the following prompt:

“You’re a world-class marketer in the wellness space. I need you to give me engaging title options for an ebook on '10 Steps to a Healthier Lifestyle' targeted at adults over 65. Additionally, I need compelling headlines for the landing page promoting this ebook. What are some strong title and headline suggestions that will attract and convert visitors? Here are the title ideas I have so far, none of which are strong enough.” [Current title ideas inserted here]

Step-by-step protocol (cont.)

5. Look at the results. Then ask yourself one or more self-reflection questions:

Mark reviews the AI-generated suggestions and corrections:

Ebook Titles:

- *"Transform Your Health: 10 Easy Steps for Seniors"*
- *"The Ultimate Guide to a Healthier You: For Adults Over 65"*
- *"10 Simple Steps to Wellness for Seniors"*

Landing Page Headlines:

- *"Discover the Secrets to a Healthier Life in Just 10 Steps: Specially for Seniors"*
- *"Unlock Your Best Health with Our Comprehensive Guide: Perfect for Adults Over 65"*
- *"Download Your Free Ebook: 10 Steps to a Healthier Lifestyle for Seniors"*

Step-by-step protocol (cont.)

What's good here?

The titles are concise and clearly convey the ebook's purpose. Also, the headlines are engaging and promise valuable information.

What's missing?

A unique selling proposition that sets this ebook apart from other similar resources.

What haven't I thought of?

Including emotional triggers that resonate with the target audience.

What could be better?

Making the headlines more specific to the target audience's pain points and desires.

Step-by-step protocol (cont.)

What ideas surfaced that I didn't expect?

The idea to use a benefit-driven subtitle. That would enable me to add more compelling and persuasive elements to the title while keeping it “digestible.”

How could I dive a little deeper?

Adding emotional triggers to the headlines to create urgency.

How can I build on this?

Combining the main title with a compelling subtitle that includes the target audience.

What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?

What specific benefits or outcomes can readers expect from following the 10 steps?

Step-by-step protocol (cont.)

6. Use those questions to create a new prompt to get you close to what you need:

Mark inputs a new prompt:

"Using these new title and headline suggestions you've given me, can you refine them to include a unique selling proposition, emotional triggers, and specific benefits or outcomes for the target audience of adults over 65?"

AI-suggested titles/headlines:

Refined Ebook Titles with Subtitles:

- "Transform Your Health: 10 Easy Steps for Seniors to Boost Vitality and Joy"
- "The Ultimate Guide to a Healthier You: 10 Steps for Adults Over 65 to Live Their Best Life"
- "10 Simple Steps to Wellness for Seniors: Enhance Your Energy, Happiness, and Longevity"

Refined Landing Page Headlines:

- "Discover the Secrets to a Healthier Life in Just 10 Steps: Boost Your Vitality and Joy Today!"
- "Unlock Your Best Health with Our Comprehensive Guide: Perfect for Adults Over 65 to Live Their Best Life"
- "Download Your Free Ebook: 10 Steps to a Healthier Lifestyle for Seniors – Achieve Wellness, Energy, and Longevity"

Step-by-step protocol (cont.)

7. Repeat steps 5 and 6 as needed:

Mark reviews the refined titles and headlines, finding them more aligned with his needs, and continues refining by iterating on the prompts and AI feedback until he arrives at the perfect combination that effectively communicates the value of the ebook and engages the target audience of adults over 65.

**I Have 6 More Use Cases
in the Next Video**

Your Assignment

Your Assignment:

1. Download and print the AI Workflow Catalyst cheat sheet included here.
2. Take out a Post-It Note and write “AI Workflow Catalyst” on it.
3. Put that note on the side of your computer monitor as a reminder.
4. Run through the AI Workflow Catalyst on a current client project or personal project (e.g., writing a LinkedIn post, prospecting, updating your website copy, etc.)