

From a search box to an assistant that does the work

Most people still use AI to **ask a question and get an answer**. The real shift is that AI can now **do the work** — read your inbox and CRM, draft the follow-up, and set up your next task, in minutes. Here's the workflow the room asked about most, plus the questions that came up live.

Build it yourself: an AI that runs your post-meeting follow-up

One attendee asked how Gmail, Zoom, and a CRM could work together for follow-up after every meeting. Our engineer answered by **typing the request in plain English** — no code. Open Claude, go to **Co-work**, and enter something like this:

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Help me set up a recurring client follow-up workflow using
my connected Gmail, Google Calendar, and Zoom accounts.
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For each completed client meeting:
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- Find the Zoom transcript, AI summary, and action items.
- Review my recent emails with the client for added context or commitments.
- Create a concise summary: decisions, key info, and actions / owners / due dates.
- Draft a personalized follow-up email in Gmail, but **DO NOT** send it — leave it in my drafts for me to review.
- Prepare a CRM note and a task list for their record.
- Flag anything sensitive, unclear, or needing compliance.

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Also create a scheduled weekday task that does all of that.
Before you run it, show me what it would look like.
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Notice the guardrails, written in plain English: “do not send — leave it in my drafts” keeps you as the final approver, and “show me what it would look like before you run it” lets you check it first. You stay in control; the busywork doesn’t.

Questions from the room

Where do most businesses go wrong when they start with AI?

Two ways: they don't really use it (no training), or they start too big. Pick one small, repetitive task, get it working well, then expand from there.

You built a custom QuickBooks connector — why not use the standard one?

The stock connector couldn't even pull a P&L. Ours now enters accounts-payable bills straight from the inbox and cut month-end journal entries from ~45 minutes to about 5.

What if my software doesn't have an open API?

Almost anything from the last 20 years has one. For the rare exception, AI can now drive the screen directly — see it, move the mouse, click, and type, the way a person would.

How long does it take to “train” it on how I work?

You don't train first and use later. You use it, and each time you save what worked to one folder. Within days it becomes your personalized agent — memory sticks fast.

Do I need a separate AI for each department?

No. Keep everything in one folder with subfolders — the context cross-pollinates. Ours once stopped a collections email on its own because it knew that client had an outage that week.