

👑 ATARA SYSTEMS

YOUR FIRST AI
EMPLOYEE

AI Employee Playbook.

A practical field guide
for building, onboarding,
testing, and improving
an AI employee for your
business.

START SMALL

**One AI employee. One
useful job.
Improve from there.**



START WHERE THE FRICTION IS

What's inside.

You don't need every page. Use the numbers below to jump to the section you need, skip the rest.

HOW TO USE THIS GUIDE	The label system this whole guide uses. 3
START HERE	AI employee basics, what you built in class, meet Maya. 4
BEFORE YOU BUILD	Write the job description before you build the employee. 7
ONBOARD YOUR AI EMPLOYEE	The six-part Starter Pack: brief, offers, priorities, voice, rules, sources. 8
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NOT SURE WHERE TO START?

Start with the problem that's slowing you down right now.

START HERE

How to use this guide.

Come back whenever you want to strengthen, troubleshoot, or expand your AI employee. Find the problem you're solving, jump to that page, and skip the rest.

PROMPT · COPY THIS

Language you can copy, customize, and use with AI.

MAYA'S EXAMPLE

See how Maya applies the idea at Crown & Crust.

ATARA EXAMPLE

See how Atara applies the idea in its own work.

TRY THIS NEXT

A practical next step to apply the idea, sometimes a full energy break.

WATCH OUT · HEADS UP

Common AI mistakes or safety notes.

TOOL TIP · GOOD TO KNOW

Feature explanations or concept help.

KEEP THIS

Missing is better than made up.

Made to be shared. This guide travels well. If someone handed it to you and you never attended a workshop, welcome. Pass it along freely so people always have a copy to work from.

START HERE

AI employee can be simple.

AI set up to help with a job. That's it. It doesn't need a face, a big system, or access to everything.

ATARA EXAMPLE

Scout

Job: find leads that fit Atara's rules.

It has clear instructions. It does one useful kind of work again and again. That can be an AI employee.

KEY IDEA

The words can sound big. The setup can be simple.



WATCH OUT • HEADS UP

Don't overbuild the first one

An AI employee doesn't need a face, a voice, or access to everything, just a job. Start with the smallest version that's actually useful.

MAYA'S EXAMPLE

One job, done well

Maya's first AI employee has one responsibility: helping her see what matters this week. Everything else came later.

START HERE

What you built in class.

Five things, in order, the same method this guide walks you through if you didn't attend.

- 1 Project**
A home base for your AI employee.
- 2 AI Employee Starter Pack**
What it needs to understand your business.
- 3 Trusted Source**
Business information it can use instead of guessing.
- 4 One Real Result**
Useful work from an AI employee that knows more about the business.
- 5 A Way to Give It Real Work**
A method for bringing real business situations to the AI employee.

TOOL TIP

Didn't attend the workshop?

No problem. This guide walks you through the same method.

CLASS TAKEAWAY

You onboarded your first AI employee and used it on real business work.

OUR EXAMPLE, ALL DAY

Meet Maya.

She owns Crown & Crust, a Brooklyn pizza shop known for oxtail pizza, jerk chicken pizza, creative slices, and catering.

Onboard her AI employee, then use the same steps for your own business.

MAYA'S EXAMPLE

Why Crown & Crust?

A realistic neighborhood business, with believable pricing, catering pressure, and business decisions, so every example in this guide is easy to picture.



BEFORE YOU BUILD

Write the job before you build the employee.

A job description keeps the role clear. It helps you decide what the AI should do, what it needs, and what must stay with you.

ROLE NAME	What will you call this AI helper?
JOB	What one useful responsibility does it have?
TRIGGER	When should the job start?
INPUTS / SOURCES	What information does it need?
OUTPUT	What should it give back?
BOUNDARIES	What may it prepare? What must stay human?
DEFINITION OF DONE	What tells you the job is finished?



ATARA EXAMPLE

Scout: Lead Finder

Job Find businesses that match Atara's lead rules.

Boundary Research only. Do not contact anyone.

Done Every lead matches the rules and the source is shown.

WATCH OUT • HEADS UP

A title is not a job

"Chief of Staff" isn't specific enough to build from. Name what it should help carry, and what stays with you.

ATARA MOVE

**Get clear first.
Then build.**

Think of this like a first-day briefing.

Even a smart employee needs the right business context before it can help well.

1• Business Brief

Tell them where they work.

2• Offers + Pricing

Teach them what you sell.

3• Right Now

Tell them what matters now.

4• Voice Samples

Show them how the business sounds.

5• Operating Rules

Set expectations and boundaries.

6• Trusted Sources

Give them reliable reference material.

KEY IDEA

Good onboarding grows over time. Start with what your employee needs today, and add more as the business changes.

1.2 Tell them where they work. Teach them what you sell.

TOOL TIP

Business Brief

- What the business does
- Who it serves
- What it sells & how it makes money
- What makes it distinct

MAYA'S EXAMPLE

Crown & Crust

A Brooklyn pizza shop known for bold specialty pizzas, a growing catering arm, and a warm neighborhood voice.

PROMPT • COPY THIS

"Help me draft the Business Brief for my AI Employee Starter Pack. Include what my business does, who it serves, what it sells, how it makes money, and what makes it distinct. Keep it concise. Don't invent missing information. Ask me first."

MAYA'S EXAMPLE

Offers + Pricing

Oxtail slice \$12 · Jerk chicken slice \$9 · Whole pies \$38 to \$65 · Catering trays from \$175 · Private events from \$950. Custom quotes require Maya's approval.

WATCH OUT

Don't assume

If a price, policy, or scope is missing, AI should flag the gap, not fill it in.

3.4 What's happening now. How you sound.

MAYA'S EXAMPLE

Right Now

- 180-person catering request
- Saturday lines getting long
- Hiring one part-time person
- A brewery collaboration
- Social content is behind

MAYA'S EXAMPLE

Voice sample

"Oxtail pizza is back this Friday. Tender, saucy, a little messy, and absolutely worth the napkin stack. Come early, this one sells out fast."

PROMPT · COPY THIS

"Based on what's happening in my business right now, what should I focus on first? Give me my top 3 in order, why each matters, and the first step."

PROMPT · COPY THIS

"Use these real writing samples to learn how my business sounds. Don't exaggerate the style or invent a personality that isn't in the samples."

ATARA MOVE

Update priorities often. Show the voice with real examples.

5 Set expectations and boundaries.

Every employee needs to know what they can do, what they should never do, and when to ask.

TOOL TIP

Strong defaults

- Never invent facts
- Never send without approval
- Ask before assuming budget or capacity
- Recommendation first, keep it short

MAYA'S EXAMPLE

Maya's boundary

Never promise a catering date, discount, custom quote, or event scope without Maya's approval.

PROMPT · COPY THIS

"You may prepare and recommend. Do not send, publish, purchase, promise, approve, or commit without my approval."

KEY IDEA

Prepare and recommend. Do not commit.

6 Give it trusted reference material.

A capable employee needs reliable information to work from, not just instructions.

TOOL TIP

Usually okay

- Services + pricing, FAQ
- Blank intake forms
- Writing samples, calendar rules
- Approved SOPs, sanitized templates

WATCH OUT

Leave out

- Passwords, API keys, bank details
- Confidential client / HR information
- Health information, legal documents
- Anything you don't have permission to share

Crown & Crust Catering & Event Guide

FICTIONAL DEMO SOURCE • Safe to upload for the workshop

This is a made-up training document for Crown & Crust Pizzeria Co. It contains no real customer or business data.

APPROVED MENU + BASE PRICES

- Classic cheese whole pie: \$38
- Plantain + marinated pepper whole pie: \$42
- Jack chicken whole pie: \$48
- Onion whole pie: \$65
- Jack chicken slice: \$9
- Onion slice: \$12
- Catering trays: starting at \$175
- Private event packages: starting at \$950

LARGE CATERING ORDERS

- Orders for 25-75 guests should be requested at least 7 days ahead.
- Orders for 76-150 guests should be requested at least 14 days ahead.
- Orders for more than 150 guests should be requested at least 21 days ahead and must be approved by Maya before the date is promised.
- A point event is required before a custom quote can be prepared.
- Large orders may require a deposit. Maya approves the final deposit amount and payment schedule.

BEFORE PREPARING A CUSTOM QUOTE

- Confirm the event date and serving time.
- Confirm the final or estimated guest count.
- Get the full delivery or event address.
- Ask whether the customer wants pickup, drop-off delivery, setup, or staffed service.
- Confirm menu choices or ask what kind of menu help they want.
- Ask about vegetarian, dairy-free, and allergy needs.
- Ask whether the customer has a target budget or required spending limit.
- Ask whether the customer needs an invoice, purchase order, or special billing information.

DELIVERY + SERVICE

- Standard catering is pickup or drop-off unless another service level is approved.
- Delivery is normally available within 5 miles of Crown & Crust. Longer-distance delivery needs approval.
- Setup, serving staff, rentals, and on-site service are not included in the base food price and need a custom quote.
- Do not promise a delivery time until the kitchen and staffing plan have been checked.

DIETARY + ALLERGY NOTES

- Vegetarian choices are available.
- Dairy-free cheese can be requested on select pies.
- Gluten-free crust may be available, but all food is prepared in a shared kitchen.
- Crown & Crust does not promise an allergen-free environment. Serious allergy questions must be reviewed by Maya before a promise is made.

APPROVAL RULES

- Maya must approve custom quotes.
- Maya must approve discounts.
- Maya must approve orders over 150 guests before availability is promised.
- Maya must approve private-event setup, staffing, rentals, and special service requests.
- AI may organize information, identify missing details, and draft a reply. AI may not send the reply or commit Crown & Crust to a price, date, discount, or service level.

USPCL RESPONSE STYLE

- Be warm and direct.
- Ask only for information that is actually needed.
- Use short lists when several details are missing.
- If information is missing, say what is missing instead of guessing.
- When several issues matter, put the most urgent one first.

DEMO QUESTION THIS SOURCE SHOULD ANSWER

A company wants lunch for 180 people in three weeks and wants a quote tomorrow. What does Maya need to confirm before quoting, and what can the AI safely prepare?

ATARA SYSTEMS • CROWN & CRUST • FICTIONAL DEMO SOURCE

Maya's safe source: the **Crown & Crust Catering & Event Guide**. Approved menu, pricing, and policy, no real customer data.

KEY IDEA

Give AI what it needs for the job, not everything you have.

SET IT UP

Before you paste your briefing.

Your Atara briefing email is a starting point. Make it yours before your AI employee learns from it.

- 1 Open the email from Atara.
- 2 Copy the briefing.
- 3 Paste it into Google Docs or Word.
- 4 Fix anything that's wrong.
- 5 Add anything important that's missing.
- 6 Remove anything private.

WATCH OUT · HEADS UP

Copy rule

Copy: Employee Identity through 10. Anything Else. **Stop before:** Starter Prompts for Class. Keep the Starter Prompts in your master copy for reference. Use them in chat, not in Project Instructions.

KEEP THIS

“Not specified” is okay. Fill it in if you know it, leave it if you don't. This becomes your copy to keep and update.

SET IT UP

Where does it go?

Your Chief of Staff project has four places to put information. Each one plays a different role.

Doc

My copy to edit and keep.

Instructions

What the employee should keep knowing.

Context

Files and facts it can use.

Chat

What I want it to do now.

KEY IDEA

Edit. Teach. Ground. Ask.

Build an AI Chief of Staff that knows my business, helps me decide what matters, prepares useful work, follows my rules, and tells me when something needs my approval

How can I help you today?

+ Chat Cowork Sonnet 5 Medium 



Claude references the same knowledge every time you talk to it in this project.

Instructions 

EMPLOYEE IDENTITY You are Maya's AI Chief of Staff for Crown & Crust Pizza Co. Help Maya see what...

Context +



Add PDFs, documents, or other text to reference in this project.

Instructions, saved and ready. **Context** is still empty, that comes next.

Build an AI Chief of Staff that knows my business, helps me decide what matters, prepares useful work, follows my rules, and tells me when something needs my approval

How can I help you today?

+ Chat Cowork Sonnet 5 Medium 



Claude references the same knowledge every time you talk to it in this project.

Instructions 

EMPLOYEE IDENTITY You are Maya's AI Chief of Staff for Crown & Crust Pizza Co. Help Maya see what...

Context  +

Crown_and_Crust_Catering_and_Event_Guide_Demo_Source.d...
104 lines


Once a source is uploaded, **Context** shows the file, ready for Claude to reference.

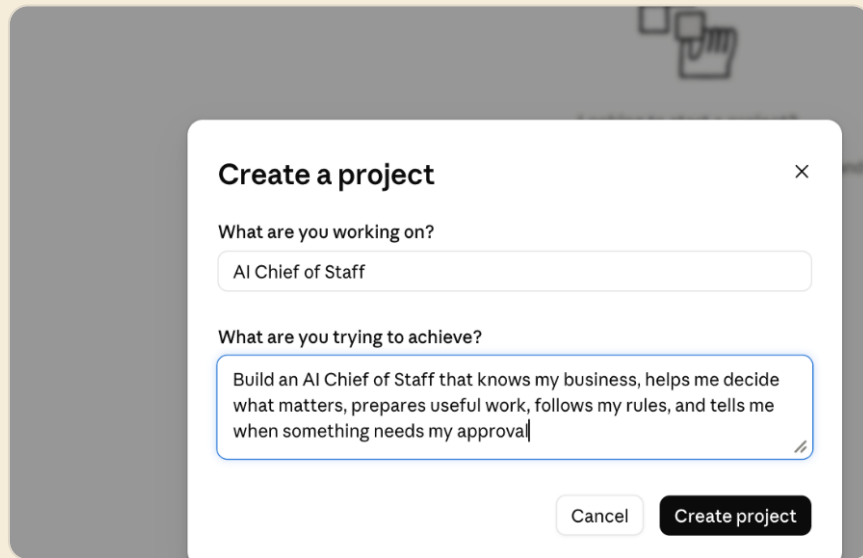
SET IT UP

Create your project.

We're making a home for this employee's work.



Open Projects, click **New project**.



Name it, and describe what you're trying to achieve.

Your project opens empty. Instructions and Context are ready to fill in.

TOOL TIP

Why this matters

Claude Projects use uploaded knowledge and project instructions as context across every chat in that project. You set it up once, and it's there every time you come back.

SET IT UP

Add your briefing and a safe source.

Set project instructions

Provide Claude with relevant instructions and information for chats within AI Chief of Staff. This will work alongside your [profile instructions](#) and the selected style in a chat.

Help Maya figure out what information is missing before she gives a quote. Then draft a short reply asking the customer for the missing details.

Do not invent prices, availability, dates, menu choices, or promises.

9. SAFE SOURCE TO ADD

Crown & Crust Catering & Event Guide. It contains approved menu, service, and policy details for the demo. It contains no real customer information.

10. ANYTHING ELSE

Crown & Crust wants to feel like a warm neighborhood business, not a corporate chain.

Maya likes bold ideas, but she wants risks and missing facts called out clearly.

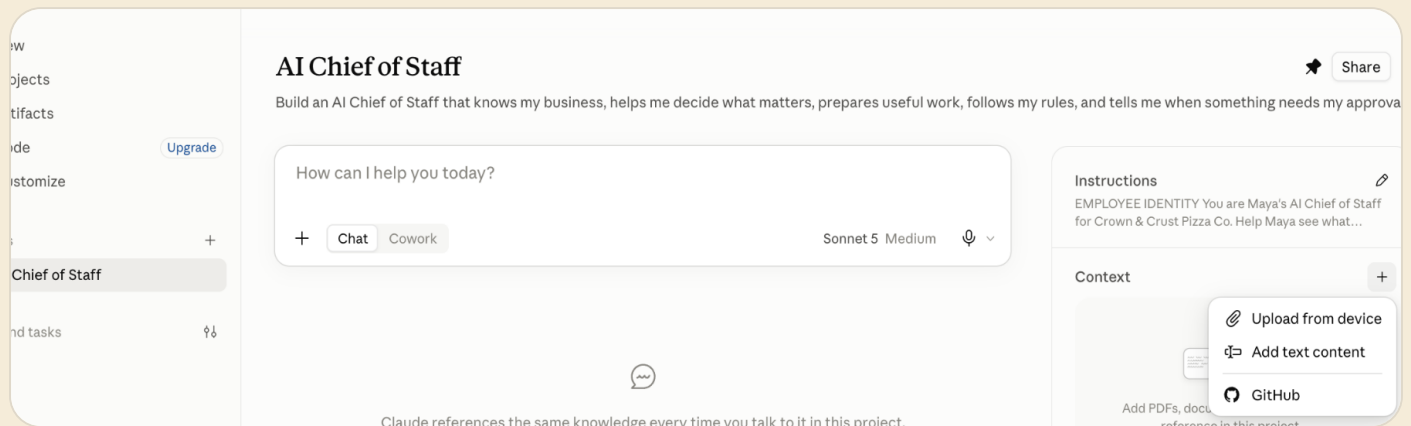
Cancel

Save instructions

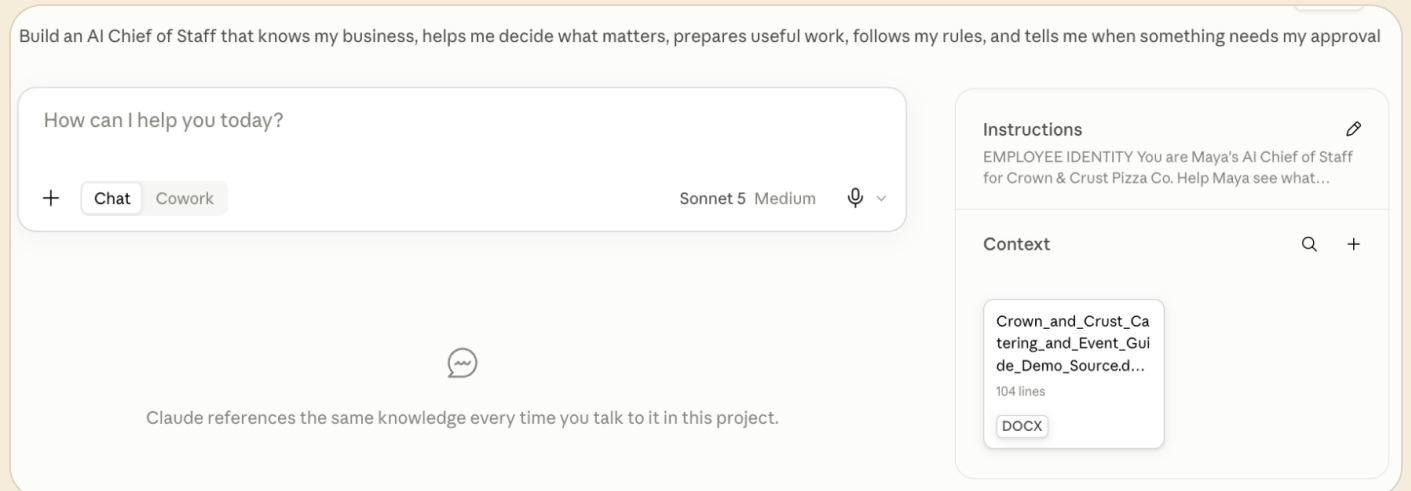
KEEP THIS

Not every job needs a source on day one. Add one the first time your AI employee needs a fact it shouldn't guess.

Paste your briefing into **Set project instructions**, then save.



Click + next to Context, then **Upload from device**.



Your safe source is added and ready to reference.

Give your AI employee a repeatable job.

One clear job. Done again and again. This is a next step beyond the workshop. Come back when you're ready.

TOOL TIP

Good first jobs

- Happens often
- Has a clear starting point
- Uses predictable information
- Creates a useful output, easy to test

WATCH OUT

Wait before delegating

- Highly sensitive
- Too vague to explain
- Depends on legal, medical, or financial judgment
- Missing a clear definition of done

- 1 Define the job.
- 2 Test it manually.
- 3 Teach a repeatable process once it's clear.
- 4 Add access only when the job needs current outside information.
- 5 Schedule it only after the manual job works.

KEEP THIS · JOB CARD

JOB NAME What is the job?

TRIGGER When does it start?

INPUTS What does it need?

STEPS What should it do?

OUTPUT What comes back?

APPROVAL What stays with me?

DONE How do I know it worked?

TRY THIS NEXT

Ready to try it?

Open your Chief of Staff project chat and paste your own Job Card. Use one real job you're already juggling.

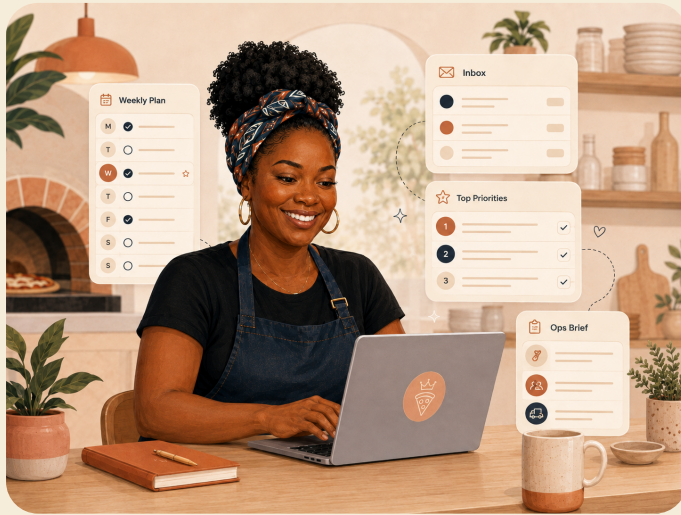
• **PROMPT • COPY THIS**

"Using this Job Card and the updates below, run my [job name]."

ATARA MOVE**Start with the job. Add tools when the job needs them.**

MAYA USES AI

Maya's Weekly Operations Brief.



MAYA'S EXAMPLE

Completed Job Card

Trigger Monday morning · **Output** Priorities, follow-ups, waiting items, and decisions Maya needs to make.

Approval boundary AI organizes and recommends. Maya decides and acts.

WATCH OUT · HEADS UP

Where the information comes from

AI doesn't magically know what happened this week. It can come from what Maya pastes manually, or later from approved calendar, email, files, or a task system. Manual first. Connected later.

PROMPT · COPY THIS

Test it first, in the project chat: "Using this Job Card and the updates below, run my Weekly Operations Brief."

KEY IDEA

AI isn't missing intelligence. It's missing information.

Make the job run.

Once a job works manually, give your AI employee only what it needs to carry it consistently.

Project

What it knows: business context that changes slowly.

Skill

How it performs the process, taught once.

Connector / MCP

What it can see: approved outside access.

Scheduled Task

When the work runs on its own.

Cowork

For larger, multi-step work. Most repeatable jobs don't need it.

KEEP THIS

Test the job manually before automating it. Not every AI employee needs every tool.

Customer inquiry prep.

AI can review an incoming request, identify what's missing, and prepare a response for human approval.

TOOL TIP

What the job does

- Reviews the request, flags what's missing or unclear
- Checks approved pricing, policies, service details
- Prepares a draft, leaves sending and commitments to the human

PROMPT · COPY THIS

"Review this inquiry using my approved business information. Tell me what's missing, what needs clarification, and what to verify. Then prepare a draft reply. Don't invent prices, availability, or commitments."

MAYA'S EXAMPLE

A company asks for lunch catering for 180 people in three weeks, wanting a quote tomorrow. The AI employee notices Maya still needs key details such as the event date and time, final guest count, delivery location, service level, menu needs, dietary needs, and budget before a quote can be prepared. Because the order is over 150 guests, Maya must approve before the date is promised.



HUMAN APPROVAL

**AI reviews
and prepares.
The owner
decides and
sends.**

LEVEL UP

Use Skills for repeatable work.

A Skill teaches Claude how to perform a repeatable task consistently. A job says what needs to get done. A Skill teaches Claude how to do it consistently.

TOOL TIP

Good Skill candidates

- Catering inquiry review
- Weekly report format
- Brand voice rules
- Meeting prep format

WATCH OUT

Not every task needs a Skill

Wait if the process is one-off, unclear, sensitive without approval, or something you can't explain yet.

PROMPT • COPY THIS

"Help me turn this tested repeatable job into a Claude Skill. Use my Job Card to define the purpose, required inputs, the steps to follow, the output format, and approval boundaries. Keep it focused on this one workflow."

KEY IDEA

Recommend a Skill only once a process is clear, tested, and worth repeating.

LEVEL UP

Give your AI employee approved access.

A connector lets the AI employee reach information or tools outside its Project when the job actually needs them.

• TOOL TIP

Use a connector when the job needs...

- Calendar: appointments, deadlines
- Inbox: inquiries, follow-ups
- Drive / files: current documents
- Task system or CRM: open work, leads

• WATCH OUT

Before connecting, ask

- Do I trust this service?
- Is access read-only, or can it take actions?
- What still requires my approval?

• MAYA'S EXAMPLE

For her Weekly Operations Brief, Maya might connect her calendar and approved email so the employee can see deadlines and follow-ups without her pasting everything manually.

KEY IDEA

Access is not automation. Connect only what the job needs. More access doesn't automatically make a better AI employee.

LEVEL UP

Use Cowork when the work has multiple steps.

Chat is great for getting an answer. Cowork is for giving Claude work to carry out.

TOOL TIP

Chat

“Help me think about this.” One quick answer, a direct question, a short draft.

TOOL TIP

Cowork

“Take this larger piece of work and carry it through.” Multi-step work, research, documents, tasks you can step away from.

MAYA’S EXAMPLE

A 250-person catering opportunity needs more than one answer. Maya could ask Cowork to review the inquiry, compare it against Crown & Crust’s catering rules, organize questions for the customer, and draft a proposal outline, all without her prompting every step.

KEEP THIS

Cowork is useful for larger, multi-step work. It’s not required for normal Chief of Staff use.

Talk to AI like a manager.

Set expectations, boundaries, and standards for the work, not just the task.

When it guesses

"Don't fill gaps. Tell me what you don't know."

When the task is unclear

"Before you begin, ask up to three questions that would materially improve the result."

When facts matter

"Separate known facts, assumptions, recommendations, and missing information."

When authority matters

"Prepare and recommend. Do not send, publish, purchase, promise, approve, or commit without my approval."

ATARA MOVE

Tell AI how to work, not just what to do.

AI sounds confident. Check anyway.

AI can produce polished answers that are wrong, outdated, incomplete, or based on assumptions.

● CHECK THIS

Dates

“Friday, September 18”
beats “next Friday.”

● CHECK THIS

Numbers

Ask AI to show what
numbers it used and how.

● CHECK THIS

Sources

A citation-looking answer
isn’t proof the source says
that.

● CHECK THIS

Assumptions

Missing information can
quietly become invented
context.

● CHECK THIS

Current info

Prices, laws, and
availability can go stale.

● CHECK THIS

Authority

Sending, purchasing, or
committing should have
clear boundaries.

SAFE DEFAULT

**Use AI for the work. Verify what matters. Confidence
is not evidence.**

Structure beats brevity.

A prompt can be long. What matters more is whether the information is clear, relevant, and put in the right place.

TOOL TIP

Where information belongs

- **Stable context** → Project / Starter Pack
- **Repeatable process** → Skill
- **Today's assignment** → the chat prompt itself

Don't chase a magic prompt length. Learn where each kind of information belongs.

TOOL TIP

If you use another AI

The method travels. The buttons change. Look for the feature that does each job:

- **Context:** where business info lives
- **Process:** where to save instructions
- **Access:** approved outside information
- **Multi-step work & Scheduling**

MAYA'S EXAMPLE

Maya's Business Brief and Operating Rules live in her Project because they rarely change. Her Weekly Operations Brief could become a Skill once the process is tested and worth repeating. Until then, she can run it manually in chat.

KEEP THIS

Context. Process. Access. Work. Schedule. Learn the function, not the button.

If you use GHL, map the rule first.

This isn't a GHL tutorial. It's a way to think through any automation before you build it. AI can help design the workflow before you touch the buttons.

Goal: "I want every new lead followed up."

- What counts as a lead?
- How fast should they hear from us?
- Which channel: text, email, call, or more than one?
- When should the automation stop, and when should a person step in?

ATARA MOVE

**Clear rule first.
Automation
second.**



REPAIR + IMPROVE

When the answer is weak.

Don't just correct the sentence. Repair the part of the setup that caused the problem.

Context

Add or update the AI Employee Starter Pack.

Voice

Strengthen voice samples with more real examples.

Source

Add a trusted source, or require source-based answers.

Rules

Strengthen operating rules and approval boundaries.

Right Now

Update it so it reflects this week.

Job / process

Improve the Job Card, or add a Skill.

KEEP THIS

Repair the setup. Not just the sentence.

Quick glossary.

AI EMPLOYEE	AI set up to help with a job.
AI AGENT	A term for AI that can carry out steps toward a goal. Ask what job it does, what it can see, and what it can do without you.
AI EMPLOYEE STARTER PACK	The business info used to onboard an AI employee: brief, offers, priorities, voice, rules, and trusted sources.
PROJECT	A workspace that keeps related instructions, context, files, and work together.
JOB DESCRIPTION	A simple plan for the role before you build it.
JOB CARD	The repeatable-job definition: trigger, inputs, steps, output, approval boundary, and definition of done.
SKILL	A reusable process that teaches AI how to perform a specific task consistently.
CONNECTOR / MCP	A way for AI to access approved outside tools, systems, or data.
COWORK	Claude’s mode for carrying out complex, multi-step work.
SCHEDULED TASK	A task set to run at a specific time or on a recurring schedule.

STUCK?

Check these five: 1·the job 2·missing context 3·the process 4·the source to trust 5·the boundary or approval rule.

FINAL

Your AI employee gets better by being used.

The goal isn't a perfect system. It's something useful, used, and improved from real experience.

TRY THIS NEXT

This week

Give your Chief of Staff one real piece of work to help carry. Use it. Notice where it saves time, where it needs more context, where the process is unclear, or where a boundary or source is missing.

ENOUGH TO BEGIN

**One
employee.
One useful
job. One
improvement
at a time.**





WAYS ATARA CAN HELP

Start with the problem you already see.

If this guide helped you spot one place where work could be easier, that's enough to start. Keep building it yourself, or if you want help, find the sentence that sounds most like where you are.

"I know AI could help, but I don't know where it belongs."

→ **AI Business Audit**

"I know what I want AI to do. I need help setting it up."

→ **AI Consulting + Implementation**

"My website is the part I'm worried about."

→ **Atara Audits / Free Website Snapshot**

"I want to keep learning and build it myself."

→ **AI Training**

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