COMPANION TO THE OPERATIONS AND TEAM FIELD MANUAL

OPERATIONS PROMPT LIBRARY

ALL 99 COPY-READY AI PROMPTS

Every prompt from OP-01 to OP-99, in 11 categories, ready to copy, fill in, and review

OP

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FIND YOUR PROMPT

Nine prompts in each of 11 categories. Each tile jumps to its first page.

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HOW TO USE A CARD

01 **Find.** Pick the category that matches what just happened, then the prompt that matches the decision in front of you.

02 **Copy.** Select the prompt text on the card and copy it. Every prompt is complete on its own.

03 **Fill.** Replace each bracketed field with a fact you can verify. Leave optional fields out if you cannot.

04 **Review.** Read the owner review on the card, check the draft against your records, and hand it over it yourself.

CATEGORY 01 OF 11 | PART 1 OF 3

PROCEDURES AND CHECKLISTS

OP-01 to OP-09
On this page: OP-01, OP-02, OP-03

OP-01 Write a procedure from notes

Use when: You know how a task is done and it is not written down.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the task]; [my rough notes or a spoken walkthrough, pasted]; [who does it and how often]
Optional: [tools, logins or forms it uses]
Turn the notes into a numbered procedure, one action per step, each starting with a verb. Add what done looks like at the end. Mark any step where my notes skip something. If I left out my rough notes, reply only with a Needs input list. Return one procedure. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm your rough notes by watching the task done once from this page.

OP-02 Opening checklist

Use when: You want a start-of-day checklist.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the tasks, in any order]; [which ones must happen before customers arrive]
Put the tasks in the order they should be done, group them by area, and mark the ones that must be done before opening. One line each, with a box to tick. If I left out the tasks, reply only with a Needs input list. Return one checklist. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the tasks yourself. It is the one fact this prompt refuses to guess.

OP-03 Closing checklist

Use when: You want an end-of-day checklist.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the tasks, in any order]; [the ones tied to safety, cash or security]
Order the tasks, group them by area, and put safety, cash and security items in their own block at the end with a line for initials. If I left out the tasks, reply only with a Needs input list. Return one checklist. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the tasks. Match that to your records.

CATEGORY 01 OF 11 | PART 2 OF 3

PROCEDURES AND CHECKLISTS

OP-01 to OP-09
On this page: OP-04, OP-05, OP-06

OP-04 Quality check

Use when: A job should be checked before it is called done.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job type]; [what a good result looks like, point by point]; [the mistakes that happen most]
Write a quality checklist of pass or fail items drawn from the points and the common mistakes. Each item must be checkable by looking or measuring. If I left out what a good result looks like, reply only with a Needs input list. Return one checklist. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what a good result looks like by watching the task done once from this page.

OP-05 Simplify a procedure

Use when: A written procedure is too long and nobody follows it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the current procedure, pasted]; [the steps people skip]
Rewrite it to the fewest steps that still get the result. Keep every safety and money step. List what you merged or cut and why. If I left out the current procedure, reply only with a Needs input list. Return the shorter procedure and a list of changes. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the current procedure yourself. It is the one fact this prompt refuses to guess.

OP-06 What to do when it goes wrong

Use when: A procedure needs a section for problems.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the procedure]; [the three things that most often go wrong]; [who to call for each]
Write an if-this-then-that table for the three problems: what they see, what to do first, who to call. If I left out the three things that go wrong, reply only with a Needs input list. Return one table. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the three things that go wrong. Match that to your records.

CATEGORY 01 OF 11 | PART 3 OF 3

PROCEDURES AND CHECKLISTS

OP-01 to OP-09
On this page: OP-07, OP-08, OP-09

OP-07 Handoff between shifts

Use when: One shift needs to tell the next what happened.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Reader: [who will use or receive this, and their role]

Scenario: [what a shift needs to pass on, by category]

Write a handoff form with a line per category, short enough to fill in under three minutes, and a line for the one thing the next shift must do first. If I left out what a shift needs to pass on, reply only with a Needs input list. Return one form. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW

Confirm what a shift needs to pass on by watching the task done once from this page.

OP-08 Equipment care schedule

Use when: Equipment needs regular care.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Reader: [who will use or receive this, and their role]

Scenario: [each piece of equipment]; [what care it needs and how often, from its manual or my practice]

Build a schedule table by day, week and month, with a column for initials and date. Add no maintenance tasks that I did not list. If I left out what care it needs and how often, reply only with a Needs input list. Return one schedule. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW

Check what care it needs and how often yourself. It is the one fact this prompt refuses to guess.

OP-09 One-page reference card

Use when: A long procedure needs a card for the wall.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Reader: [who will use or receive this, and their role]

Scenario: [the procedure]; [the five steps people forget]

Write a card of at most 80 words with the five steps as short commands and one line on who to ask. If I left out the five steps people forget, reply only with a Needs input list. Return one card under 80 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW

Last look before you hand it over: the five steps people forget. Match that to your records.

CATEGORY 02 OF 11 | PART 1 OF 3

HIRING

OP-10 to OP-18
On this page: OP-10, OP-11, OP-12

OP-10 Job description

Use when: You are defining a role.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job title]; [what the person does in a normal week]; [what they must already know]; [what I will teach]; [pay or range]; [schedule]
Write a job description in four parts: the work, what the person needs to start, what we teach, and pay and schedule. Describe the hard part of the job honestly. If I left out what the person does in a normal week, reply only with a Needs input list. Return one description under 250 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what the person does in a normal week is accurate, and have hiring wording reviewed for your state.

OP-11 Job post

Use when: You are advertising the role.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job description]; [where it will be posted]; [how to apply]
Write a job post that leads with title, pay and schedule, then the work in five short lines, then how to apply. No phrases like fast-paced or wear many hats. If I left out how to apply, reply only with a Needs input list. Return one post under 160 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check how to apply yourself. It is the one fact this prompt refuses to guess.

OP-12 Screening questions

Use when: You want to screen applicants quickly.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [the three things someone must have to do it]; [deal-breakers such as schedule or license]
Write six screening questions that can be answered in a sentence each, tied to the three must-haves and the deal-breakers. Ask nothing about age, family, health, religion or origin. Employment rules vary by state. This is not legal advice. If I left out the three things someone must have, reply only with a Needs input list. Return six questions. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the three things someone must have. Match that to your records.

CATEGORY 02 OF 11 | PART 2 OF 3

HIRING

OP-10 to OP-18
On this page: OP-13, OP-14, OP-15

OP-13 Interview guide

Use when: You want every candidate asked the same questions.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [the four skills or traits that matter most]; [what a strong answer shows for each]
Write an interview guide: two questions per skill that ask for a real past example, with what to listen for and a 1 to 4 scoring note. Same questions for every candidate. If I left out the four skills that matter, reply only with a Needs input list. Return one guide. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the four skills that matter is accurate, and have hiring wording reviewed for your state.

OP-14 Reply to an applicant, moving forward

Use when: You want to invite an applicant to the next step.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [the next step]; [the times I can offer]; [what to bring]
Write a short invitation with the times as a list and what to bring. If I left out the next step, reply only with a Needs input list. Return one message under 80 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the next step yourself. It is the one fact this prompt refuses to guess.

OP-15 Reply to an applicant, not selected

Use when: You are turning an applicant down.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [whether I want to keep them in mind, yes or no]
Write a brief, kind note that gives the decision in the first sentence. Give no reasons and no comparison to other candidates. Say we will keep them in mind only if that is true. If I left out the role, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the role. Match that to your records.

CATEGORY 02 OF 11 | PART 3 OF 3

HIRING

OP-10 to OP-18
On this page: OP-16, OP-17, OP-18

OP-16 Reference check

Use when: You are calling a reference.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [what I most need to confirm]
Write six reference questions that ask what the person did, not for opinions of their character. Include one that confirms dates and title. If I left out what I most need to confirm, reply only with a Needs input list. Return six questions. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what you most need to confirm is accurate, and have hiring wording reviewed for your state.

OP-17 Offer letter draft

Use when: You are making an offer.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role and start date]; [pay and pay schedule]; [hours]; [benefits I actually offer]; [conditions, such as a background check]
Draft a plain offer letter with each term on its own line. Add no terms that are not listed. Employment rules vary by state. This is not legal advice. Flag for review by my attorney or HR adviser before sending. If I left out pay and pay schedule, reply only with a Needs input list. Return one letter under 220 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check pay and pay schedule yourself. It is the one fact this prompt refuses to guess.

OP-18 Working interview or trial shift plan

Use when: You want to see a candidate do the work.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [the tasks they will try]; [how long]; [whether it is paid and how much]
Write a plan for the trial with the tasks, what I will watch for, and how it is paid. Pay rules for trial work vary by state. This is not legal advice. Flag for my review. If I left out whether it is paid, reply only with a Needs input list. Return one plan. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: whether it is paid. Match that to your records.

CATEGORY 03 OF 11 | PART 1 OF 3

ONBOARDING AND TRAINING

OP-19 to OP-27
On this page: OP-19, OP-20, OP-21

OP-19 First-day plan

Use when: A new hire starts soon.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [who they will meet]; [what must be set up]; [what they should be able to do by the end of day one]
Write an hour-by-hour first day with who they meet, what gets set up, and the one thing they will be able to do by day's end. If I left out what they should be able to do, reply only with a Needs input list. Return one schedule. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what they should be able to do with the person who will be there on the day.

OP-20 First-week plan

Use when: You want the first week mapped.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [the five things they must learn first, in order]; [who teaches each]
Write a day-by-day plan with one main thing to learn each day, who teaches it, and how I will know they have it. If I left out the five things they must learn first, reply only with a Needs input list. Return one plan. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the five things they must learn first yourself. It is the one fact this prompt refuses to guess.

OP-21 Welcome message

Use when: You are welcoming a new hire before day one.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [start date and time]; [where to go and who to ask for]; [what to bring]; [what to wear]
Write a short welcome with the practical details on their own lines. If I left out start date and time, reply only with a Needs input list. Return one message under 90 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: start date and time. Match that to your records.

CATEGORY 03 OF 11 | PART 2 OF 3

ONBOARDING AND TRAINING

OP-19 to OP-27
On this page: OP-22, OP-23, OP-24

OP-22 Training outline

Use when: You need to teach one skill.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the skill]; [what the learner knows now]; [the steps to competence]; [how they will be checked]
Write a training outline: show it, do it together, do it alone, check. One line on what the trainer says or does at each stage. If I left out the steps to competence, reply only with a Needs input list. Return one outline. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the steps to competence with the person who will be there on the day.

OP-23 Quiz

Use when: You want to check that training stuck.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the material, pasted]; [how many questions]
Write the quiz from the material only: questions with one clearly right answer each, and an answer key with where in the material each answer is found. If I left out the material, reply only with a Needs input list. Return one quiz and one answer key. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the material yourself. It is the one fact this prompt refuses to guess.

OP-24 Role scorecard

Use when: You want a new hire to know what good looks like.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role]; [the three to five results that matter]; [how each is measured]
Write a one-page scorecard with each result, how it is measured, and what meets and what misses. If I left out how each is measured, reply only with a Needs input list. Return one scorecard. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: how each is measured. Match that to your records.

CATEGORY 03 OF 11 | PART 3 OF 3

ONBOARDING AND TRAINING

OP-19 to OP-27
On this page: OP-25, OP-26, OP-27

OP-25 Thirty-day check-in

Use when: A new hire has been here a month.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what they have learned]; [where they are strong]; [what still needs work]; [what they have asked for]
Write questions for a thirty-day conversation, and a short written summary I can fill in afterward with what was agreed. If I left out what still needs work, reply only with a Needs input list. Return one question list and one summary form. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what still needs work with the person who will be there on the day.

OP-26 Handbook section

Use when: You need to write one policy for your handbook.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the topic]; [my actual rule]; [who to ask about exceptions]
Write the section in plain words: the rule, why it exists in one line, and who to ask. Add no rule I did not state. Workplace policies are shaped by state and federal law. This is not legal advice. Flag for review before it is adopted. If I left out my actual rule, reply only with a Needs input list. Return one section under 180 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check your actual rule yourself. It is the one fact this prompt refuses to guess.

OP-27 Tool or system guide

Use when: A new hire must learn a system you use.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the system]; [the five things they will do in it most]; [where each is found]
Write a short guide to the five tasks, each as numbered steps with what the screen should show. Mark any step where I have not told you where something is. If I left out the five things they will do most, reply only with a Needs input list. Return one guide. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the five things they will do most. Match that to your records.

CATEGORY 04 OF 11 | PART 1 OF 3

TEAM MESSAGES

OP-28 to OP-36
On this page: OP-28, OP-29, OP-30

OP-28 Schedule change

Use when: The schedule is changing.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what is changing]; [the dates]; [who is affected]; [who to tell if it does not work]
Write a message with the change and dates first, then who is affected and who to contact. If I left out the dates, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the dates before the team reads it.

OP-29 New policy or rule

Use when: A rule is starting or changing.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the rule]; [the date it starts]; [the reason, in one honest line]; [what people must do differently]
Write a message that states the rule and the date in the first two sentences, then the reason and what changes in practice. If I left out the date it starts, reply only with a Needs input list. Return one message under 110 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the date it starts yourself. It is the one fact this prompt refuses to guess.

OP-30 Thank the team

Use when: The team did something well.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what they did]; [the result, in facts]; [who stood out, if I want to name anyone]
Write a short thank-you that names what was done and the result. Name people only if listed. If I left out what they did, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: what they did. Match that to your records.

CATEGORY 04 OF 11 | PART 2 OF 3

TEAM MESSAGES

OP-28 to OP-36
On this page: OP-31, OP-32, OP-33

OP-31 Bad news for the team

Use when: You have to tell the team something hard.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the news]; [what it means for them]; [what is not changing]; [when they can ask questions]
Write a message that gives the news in the first sentence, what it means for them, and what stays the same. Say when and how they can ask questions. No soft language that hides the point. If I left out what it means for them, reply only with a Needs input list. Return one message under 140 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what it means for them before the team reads it.

OP-32 Reminder that keeps being ignored

Use when: A standing rule is being skipped.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the rule]; [what is happening instead]; [why it matters]; [what happens next]
Write a reminder that states the rule and the reason once, says what will happen next, and blames no one by name. If I left out why it matters, reply only with a Needs input list. Return one message under 80 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check why it matters yourself. It is the one fact this prompt refuses to guess.

OP-33 New team member announcement

Use when: Someone is joining.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [their name and role]; [start date]; [what they will handle]; [one detail they agreed to share]
Write a short announcement with what they will handle and when they start. If I left out their name and role, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: their name and role. Match that to your records.

CATEGORY 04 OF 11 | PART 3 OF 3

TEAM MESSAGES

OP-28 to OP-36
On this page: OP-34, OP-35, OP-36

OP-34 Departure announcement

Use when: Someone is leaving.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [who is leaving and their last day]; [who takes over their work]; [what I can say about the reason, if anything]
Write an announcement with the last day and who takes over what. Give a reason only if one is listed. If I left out who takes over their work, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm who takes over their work before the team reads it.

OP-35 Urgent notice

Use when: Something needs attention right now.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what happened]; [what to do right now]; [who is in charge]
Write a notice under 40 words with the action first. If I left out what to do right now, reply only with a Needs input list. Return one message under 40 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what to do right now yourself. It is the one fact this prompt refuses to guess.

OP-36 Weekly team note

Use when: You send a short note each week.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what went well]; [what did not]; [the three things that matter this week]
Write a weekly note in three short blocks. No more than 120 words. If I left out the three things that matter this week, reply only with a Needs input list. Return one note under 120 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the three things that matter this week. Match that to your records.

CATEGORY 05 OF 11 | PART 1 OF 3

MEETINGS

OP-37 to OP-45
On this page: OP-37, OP-38, OP-39

OP-37 Agenda

Use when: A meeting needs an agenda.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the purpose, in one sentence]; [the topics]; [who must be there]; [the time I have]
Write an agenda with a time for each topic, who leads it, and what decision or output is wanted from each. If a topic needs no decision, suggest handling it by message instead. If I left out the purpose, reply only with a Needs input list. Return one agenda. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the purpose with the people who have to be in the room.

OP-38 Notes from a transcript

Use when: You have a recording or rough notes.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the transcript or notes, pasted]
Write meeting notes in three parts: decisions, tasks with owner and date, and open questions. Include only what was said. Mark any task with no owner or no date. If I left out the transcript or notes, reply only with a Needs input list. Return one set of notes. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the transcript or notes yourself. It is the one fact this prompt refuses to guess.

OP-39 Follow-up message

Use when: The meeting is over and people need the outcome.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the decisions]; [the tasks with owners and dates]
Write a follow-up with decisions first and tasks as a list of who, what, by when. If I left out the tasks with owners and dates, reply only with a Needs input list. Return one message under 120 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the tasks with owners and dates. Match that to your records.

CATEGORY 05 OF 11 | PART 2 OF 3

MEETINGS

OP-37 to OP-45
On this page: OP-40, OP-41, OP-42

OP-40 One-on-one outline

Use when: You meet regularly with an employee.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the employee's role]; [what has happened since the last meeting]; [what I need to raise]
Write an outline that starts with their topics, then mine, then what each of us will do before next time. If I left out what I need to raise, reply only with a Needs input list. Return one outline.
Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what you need to raise with the people who have to be in the room.

OP-41 Decision memo

Use when: A decision needs to be written down.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the decision]; [the options considered]; [why this one]; [who decided]; [when it will be looked at again]
Write a half-page memo with those five parts. If I left out the decision, reply only with a Needs input list. Return one memo under 180 words.
Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the decision yourself. It is the one fact this prompt refuses to guess.

OP-42 Cancel a meeting

Use when: A meeting is not needed.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the meeting]; [what will happen instead]
Write a two-sentence message that cancels it and says how the topic will be handled. If I left out what will happen instead, reply only with a Needs input list. Return one message under 40 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: what will happen instead. Match that to your records.

CATEGORY 05 OF 11 | PART 3 OF 3

MEETINGS

OP-37 to OP-45
On this page: OP-43, OP-44, OP-45

OP-43 Stand-up format

Use when: You want a short daily check-in.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [team size]; [what I need to hear each day]
Write a format that fits in ten minutes: the questions each person answers and the one rule that keeps it short. If I left out what I need to hear each day, reply only with a Needs input list. Return one format. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what you need to hear each day with the people who have to be in the room.

OP-44 Problem review

Use when: Something went wrong and you want to learn from it.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what happened, in order]; [what it cost]; [what was already tried]
Write a review outline: timeline, what we know caused it, what we do not know, and changes to try. Describe systems and steps, not people. If I left out what happened, in order, reply only with a Needs input list. Return one outline. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what happened, in order yourself. It is the one fact this prompt refuses to guess.

OP-45 Client or vendor meeting prep

Use when: You have a meeting with someone outside the business.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [who I am meeting]; [what I want from it]; [what they likely want]; [what I will not agree to]
Write a one-page prep sheet: the outcome I want, three questions to ask, my limits, and the next step to propose. If I left out what I want from it, reply only with a Needs input list. Return one prep sheet. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: what you want from it. Match that to your records.

CATEGORY 06 OF 11 | PART 1 OF 3

VENDORS AND PURCHASING

OP-46 to OP-54
On this page: OP-46, OP-47, OP-48

OP-46 Request a quote

Use when: You need prices from a vendor.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what I need, with quantities and specs]; [when I need it]; [how I want the quote broken out]
Write a request that lists exactly what is needed, the date, and how the quote should be itemized so quotes can be compared. If I left out what I need, reply only with a Needs input list. Return one email under 130 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what you need against the last order or the spec sheet.

OP-47 Compare quotes

Use when: You have several quotes.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the quotes, pasted]; [what matters most: price, speed, terms or quality]
Build a comparison table on the same line items. Mark where quotes are not comparable and what to ask each vendor to make them so. Recommend one only if the facts clearly support it. If I left out the quotes, reply only with a Needs input list. Return one table and a list of open questions. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the quotes yourself. It is the one fact this prompt refuses to guess.

OP-48 Place an order

Use when: You are ordering.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the items and quantities]; [the agreed price]; [delivery date and address]; [payment terms]
Write an order message with each term on its own line and a request to confirm in writing. If I left out the agreed price, reply only with a Needs input list. Return one email under 100 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the agreed price. Match that to your records.

CATEGORY 06 OF 11 | PART 2 OF 3

VENDORS AND PURCHASING

OP-46 to OP-54
On this page: OP-49, OP-50, OP-51

OP-49 Late delivery

Use when: A vendor is late.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what was ordered]; [the promised date]; [what it is holding up]
Write a firm, polite message that states the promised date, asks for a new firm date by a set time, and says what it is holding up. If I left out the promised date, reply only with a Needs input list. Return one email under 90 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the promised date against the last order or the spec sheet.

OP-50 Wrong or damaged goods

Use when: A delivery was wrong or damaged.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what was ordered]; [what arrived]; [what I want: replacement, credit or refund]
Optional: [photos I will attach]
Write a message that states the difference in two lines and the remedy I want, with a date. If I left out what I want, reply only with a Needs input list. Return one email under 90 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what you want yourself. It is the one fact this prompt refuses to guess.

OP-51 Price increase from a vendor

Use when: A vendor raised prices.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the old and new price]; [how much I buy]; [what I can offer in return, such as volume or faster payment]
Write a reply that asks for the basis of the increase and proposes the trade listed. Stay cordial. If I left out what I can offer in return, reply only with a Needs input list. Return one email under 110 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: what you can offer in return. Match that to your records.

CATEGORY 06 OF 11 | PART 3 OF 3

VENDORS AND PURCHASING

OP-46 to OP-54
On this page: OP-52, OP-53, OP-54

OP-52 End a vendor relationship

Use when: You are leaving a vendor.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the vendor]; [the last order or service date]; [what the contract says about notice]
Write a short notice that gives the end date and asks for final invoices and any return of materials. If the contract term is blank, do not draft. Ask me for it. This is not legal advice. If I left out what the contract says about notice, reply only with a Needs input list. Return one email under 90 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what the contract says about notice against the last order or the spec sheet.

OP-53 New vendor questions

Use when: You are sizing up a new vendor.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what I need from them]; [what went wrong with the last one]
Write ten questions to ask, weighted toward what went wrong before, and three things to ask for in writing. If I left out what I need from them, reply only with a Needs input list. Return ten questions and three requests. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what you need from them yourself. It is the one fact this prompt refuses to guess.

OP-54 Purchase approval rule

Use when: You want a simple rule for who can buy what.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the spending levels I am comfortable with]; [who can approve at each]
Write a one-page purchasing rule as a table: amount, who approves, what record is kept. If I left out who can approve at each, reply only with a Needs input list. Return one table. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: who can approve at each. Match that to your records.

CATEGORY 07 OF 11 | PART 1 OF 3

SCHEDULING AND CAPACITY

OP-55 to OP-63
On this page: OP-55, OP-56, OP-57

OP-55 Weekly schedule message

Use when: You send the schedule each week.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the schedule, pasted]; [anything unusual this week]
Write a short message that points out only what is unusual and how to request a change. If I left out anything unusual, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm anything unusual against the posted schedule and time-off requests.

OP-56 Time-off request reply

Use when: An employee asked for time off.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the dates requested]; [my answer]; [coverage, if arranged]
Write a reply that answers yes or no in the first sentence. If no, give the reason in one line and offer other dates only if listed. If I left out my answer, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check your answer yourself. It is the one fact this prompt refuses to guess.

OP-57 Shift coverage request

Use when: You need someone to cover a shift.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the shift]; [why it is open, only if I want to say]; [any extra pay or trade]
Write a short ask with the shift details first and how to say yes. If I left out the shift, reply only with a Needs input list. Return one message under 50 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the shift. Match that to your records.

CATEGORY 07 OF 11 | PART 2 OF 3

SCHEDULING AND CAPACITY

OP-55 to OP-63
On this page: OP-58, OP-59, OP-60

OP-58 Overbooked week

Use when: You have more work than hours.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the jobs and their deadlines]; [which deadlines can move]; [my crew and hours]
Lay out the week: what fits, what does not, and which customers must be called to move. Make no promises for me. List the calls I need to make. If I left out which deadlines can move, reply only with a Needs input list. Return one plan and a call list. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm which deadlines can move against the posted schedule and time-off requests.

OP-59 Slow week

Use when: You have more hours than work.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the open hours]; [the backlog of small tasks]; [what could bring work in this week]
Build a list of what to do with the open hours, in order of value, and estimate hours only from what I gave you. If I left out the backlog of small tasks, reply only with a Needs input list. Return one list. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the backlog of small tasks yourself. It is the one fact this prompt refuses to guess.

OP-60 Job time estimate

Use when: You want to estimate how long a job takes.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job]; [times from similar past jobs]; [what is different about this one]
Estimate the time as a range based on the past jobs, and state what could push it to the high end. Give no figure my numbers do not support. If I left out times from similar past jobs, reply only with a Needs input list. Return one estimate with its basis. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: times from similar past jobs. Match that to your records.

CATEGORY 07 OF 11 | PART 3 OF 3

SCHEDULING AND CAPACITY

OP-55 to OP-63
On this page: OP-61, OP-62, OP-63

OP-61 Route or day plan

Use when: You have several stops in a day.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the stops with addresses and time windows]; [start point]; [how long each takes]
Order the stops to respect the time windows and cut backtracking. Show the order with arrival estimates and mark any window that cannot be met.
Estimates are rough, since I cannot see live traffic. If I left out the stops with time windows, reply only with a Needs input list. Return one ordered plan. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the stops with time windows against the posted schedule and time-off requests.

OP-62 On-call plan

Use when: Someone needs to be reachable after hours.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [who is in the rotation]; [what counts as an emergency]; [how the on-call person is paid]
Write a one-page on-call plan: the rotation, what counts as an emergency, and what to do first. On-call pay rules vary by state. This is not legal advice. Flag for my review. If I left out what counts as an emergency, reply only with a Needs input list. Return one plan. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what counts as an emergency yourself. It is the one fact this prompt refuses to guess.

OP-63 Capacity check before saying yes

Use when: A big job came in.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job and its dates]; [what is already booked]; [my crew and hours]
Lay out whether the job fits, what it would push, and what I would need to say yes. Give me the facts for the decision, not the decision. If I left out what is already booked, reply only with a Needs input list. Return one summary. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: what is already booked. Match that to your records.

CATEGORY 08 OF 11 | PART 1 OF 3

INVOICES AND COLLECTIONS

OP-64 to OP-72
On this page: OP-64, OP-65, OP-66

OP-64 Invoice cover note

Use when: You are sending an invoice.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the invoice number and amount]; [what it covers]; [the due date]; [how to pay]
Write a short note with the amount, what it covers, the due date and how to pay. If I left out the due date, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the due date against the invoice and the payment record.

OP-65 Friendly reminder

Use when: An invoice is a few days late.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the invoice number and amount]; [the due date]; [how to pay]
Write a reminder that assumes it was missed, not ignored. Amount and due date in the first sentence. If I left out the invoice number and amount, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the invoice number and amount yourself. It is the one fact this prompt refuses to guess.

OP-66 Second reminder

Use when: An invoice is weeks late.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the invoice number and amount]; [the due date]; [the earlier reminders and their dates]; [a late fee, only if my terms state one]
Write a firmer reminder that lists the earlier notices, asks for payment or a call by a set date, and mentions the fee only if the terms state one. If I left out the earlier reminders, reply only with a Needs input list. Return one message under 90 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the earlier reminders. Match that to your records.

CATEGORY 08 OF 11 | PART 2 OF 3

INVOICES AND COLLECTIONS

OP-64 to OP-72
On this page: OP-67, OP-68, OP-69

OP-67 Final notice

Use when: An invoice is long overdue.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the invoice number and amount]; [the full history of notices]; [what I will do next and the date]
Write a final notice that states the facts and the next step with its date. No threats beyond the stated step and nothing about the customer's character. Collection rules vary by state and by type of customer. This is not legal advice. Flag for my review. If I left out what I will do next, reply only with a Needs input list. Return one letter under 110 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what you will do next against the invoice and the payment record.

OP-68 Payment received

Use when: A late payment came in.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the invoice number and amount]; [the date received]
Write a two-sentence thank-you that confirms the invoice is paid in full, or states what remains. If I left out the date received, reply only with a Needs input list. Return one message under 40 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the date received yourself. It is the one fact this prompt refuses to guess.

OP-69 Payment arrangement confirmation

Use when: You agreed to let a customer pay over time.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the balance]; [each payment amount and date]; [what happens if a payment is missed]
Write a confirmation that lists each payment and date and what happens if one is missed. Ask them to reply to confirm. Add no terms I did not list. If I left out each payment amount and date, reply only with a Needs input list. Return one message under 110 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: each payment amount and date. Match that to your records.

CATEGORY 08 OF 11 | PART 3 OF 3

INVOICES AND COLLECTIONS

OP-64 to OP-72
On this page: OP-70, OP-71, OP-72

OP-70 Disputed invoice

Use when: A customer disputes a bill.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the invoice]; [what they dispute]; [my records on that point]
Write a reply that separates the disputed part from the rest, states what the records show, and asks them to pay the undisputed part by a date. If I left out what they dispute, reply only with a Needs input list. Return one message under 110 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what they dispute against the invoice and the payment record.

OP-71 Deposit request

Use when: You need a deposit before starting.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job]; [the deposit amount]; [what it secures]; [my refund rule]
Write a request that states the amount, what it secures, and the refund rule in one line. If I left out my refund rule, reply only with a Needs input list. Return one message under 70 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check your refund rule yourself. It is the one fact this prompt refuses to guess.

OP-72 Monthly statement note

Use when: You send statements to customers with open balances.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the open invoices with dates and amounts]; [the total]; [how to pay]
Write a short note that lists each open invoice, the total, and how to pay or ask a question. If I left out the open invoices, reply only with a Needs input list. Return one message under 90 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the open invoices. Match that to your records.

CATEGORY 09 OF 11 | PART 1 OF 3

ESTIMATES AND JOB PAPERWORK

OP-73 to OP-81
On this page: OP-73, OP-74, OP-75

OP-73 Estimate

Use when: You are quoting a job.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job]; [each line item with its price]; [what is not included]; [how long the price holds]; [payment terms]
Write an estimate with each item and price, an exclusions list, how long the price holds, and terms. Total it only from my numbers and show the arithmetic. If I left out each line item with its price, reply only with a Needs input list. Return one estimate. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm each line item with its price against your price sheet and what you saw on site.

OP-74 Scope of work

Use when: You want the job described before it starts.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what will be done]; [what will not]; [who supplies what]; [start and finish dates]; [what would change the price]
Write a scope with those five parts in plain words a customer can read in two minutes. If I left out what will be done, reply only with a Needs input list.
Return one scope under 250 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what will be done yourself. It is the one fact this prompt refuses to guess.

OP-75 Change order

Use when: The job changed after it started.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the original scope]; [the change]; [the added or reduced cost]; [the effect on the schedule]
Write a change order that states the change, the cost and the schedule effect, with a line for both signatures and the date. If I left out the added or reduced cost, reply only with a Needs input list. Return one change order. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the added or reduced cost. Match that to your records.

CATEGORY 09 OF 11 | PART 2 OF 3

ESTIMATES AND JOB PAPERWORK

OP-73 to OP-81
On this page: OP-76, OP-77, OP-78

OP-76 Job start notice

Use when: A job is about to begin.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [start date and time]; [who will be there]; [what the customer must do before]; [how long it will take]
Write a notice with the date and time first, then what the customer needs to do beforehand. If I left out what the customer must do before, reply only with a Needs input list. Return one message under 80 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what the customer must do before against your price sheet and what you saw on site.

OP-77 Daily job update

Use when: A multi-day job needs a daily note.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what was done today]; [what is next]; [anything the customer must decide]
Write three short lines: done, next, need from you. If I left out what was done today, reply only with a Needs input list. Return one message under 60 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what was done today yourself. It is the one fact this prompt refuses to guess.

OP-78 Job complete notice

Use when: The job is finished.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what was done]; [anything left for the customer to do]; [warranty or care information I give]
Write a completion note with what was done, what the customer should do next, and the care or warranty details as given. If I left out what was done, reply only with a Needs input list. Return one message under 100 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: what was done. Match that to your records.

CATEGORY 09 OF 11 | PART 3 OF 3

ESTIMATES AND JOB PAPERWORK

OP-73 to OP-81
On this page: OP-79, OP-80, OP-81

OP-79 Estimate follow-up

Use when: You sent an estimate and heard nothing.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job]; [the date I sent it]; [how long the price holds]
Write a short follow-up that asks whether they have questions and notes the date the price holds until. One message, no pressure. If I left out the date I sent it, reply only with a Needs input list. Return one message under 55 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the date you sent it against your price sheet and what you saw on site.

OP-80 Decline a job

Use when: You are turning down work.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the job]; [my reason, if I want to give it]
Optional: [someone to refer them to]
Write a brief, courteous note that says no in the first sentence. Give the reason only if listed. If I left out the job, reply only with a Needs input list. Return one message under 55 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check the job yourself. It is the one fact this prompt refuses to guess.

OP-81 Punch list

Use when: A job is nearly done and small items remain.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the open items]; [who does each]; [the date each will be done]
Write a punch list table: item, who, date, and a box for the customer to initial. If I left out the open items, reply only with a Needs input list. Return one table. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the open items. Match that to your records.

CATEGORY 10 OF 11 | PART 1 OF 3

FEEDBACK AND DIFFICULT CONVERSATIONS

OP-82 to OP-90
On this page: OP-82, OP-83, OP-84

OP-82 Praise that is specific

Use when: An employee did something well.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what they did]; [what it caused]; [when]
Write two or three sentences of praise that name the action and its effect. No general words like great job. If I left out what they did, reply only with a Needs input list. Return one message under 50 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what they did is something you saw or can document.

OP-83 Corrective feedback

Use when: An employee needs to change something.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what happened, with dates]; [the standard]; [the effect on the work or the team]; [what I need to see instead]
Write talking points for a private conversation: what was seen, the standard, the effect, and what is expected by when. Describe actions, not character. Then leave room for their side. If I left out what I need to see instead, reply only with a Needs input list. Return one set of talking points. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what you need to see instead yourself. It is the one fact this prompt refuses to guess.

OP-84 Written warning

Use when: A problem has continued after a conversation.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what happened, with dates]; [the earlier conversation and its date]; [the standard]; [what must change and by when]; [what happens if it does not]
Draft a written warning from those facts only, in neutral words, with a signature line that acknowledges receipt. Discipline carries legal risk that varies by state. This is not legal advice. Flag for review before it is given. If I left out the earlier conversation and its date, reply only with a Needs input list. Return one warning under 220 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the earlier conversation and its date. Match that to your records.

CATEGORY 10 OF 11 | PART 2 OF 3

FEEDBACK AND DIFFICULT CONVERSATIONS

OP-82 to OP-90
On this page: OP-85, OP-86, OP-87

OP-85 Performance review

Use when: It is review time.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the role's goals]; [what the employee did against each]; [strengths]; [what to work on next]
Write a review with a short paragraph per goal built on what was done, then strengths and one or two things to work on with how I will help. If I left out what the employee did against each, reply only with a Needs input list. Return one review under 300 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what the employee did against each is something you saw or can document.

OP-86 Pay raise request reply

Use when: An employee asked for a raise.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what they asked for]; [my answer]; [what would change the answer, if no]
Write talking points that give the answer plainly. If no, say what would change it and when I will look again, only if I listed that. If I left out my answer, reply only with a Needs input list. Return one set of talking points. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check your answer yourself. It is the one fact this prompt refuses to guess.

OP-87 Conflict between two employees

Use when: Two people are not working well together.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what each has told me, kept separate]; [the effect on the work]; [what I need from both]
Write a plan for three conversations: one with each, then together. Give opening lines and the ground rules for the joint one. Take no side in the wording. If I left out the effect on the work, reply only with a Needs input list. Return one plan. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: the effect on the work. Match that to your records.

CATEGORY 10 OF 11 | PART 3 OF 3

FEEDBACK AND DIFFICULT CONVERSATIONS

OP-82 to OP-90
On this page: OP-88, OP-89, OP-90

OP-88 Attendance conversation

Use when: Someone is often late or absent.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the dates]; [my attendance rule]; [what they have told me, if anything]
Write talking points that state the dates and the rule, ask what is going on before concluding anything, and say what is needed from here. If they raise a health or family reason, stop and get advice before going further. This is not legal advice. If I left out the dates, reply only with a Needs input list. Return one set of talking points. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm the dates is something you saw or can document.

OP-89 Resignation reply

Use when: An employee gave notice.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [their last day]; [what needs to be handed over]; [what I want to say]
Write a reply that accepts the notice, confirms the last day, and lists what needs to be handed over. If I left out their last day, reply only with a Needs input list. Return one message under 80 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check their last day yourself. It is the one fact this prompt refuses to guess.

OP-90 Ending employment

Use when: You have decided to let someone go.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the decision and the date]; [the reason I will state]; [final pay and return of property]
Write short talking points for the conversation and a plain confirmation letter. Keep the stated reason to the facts given. Final pay and notice rules vary by state. This is not legal advice. Have an attorney or HR adviser review both before the conversation. If I left out final pay and return of property, reply only with a Needs input list. Return talking points and one letter. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: final pay and return of property. Match that to your records.

CATEGORY 11 OF 11 | PART 1 OF 3

PLANNING AND REPORTING

OP-91 to OP-99
On this page: OP-91, OP-92, OP-93

OP-91 Weekly report

Use when: You want a one-page view of the week.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [my numbers for the week, pasted]; [last week's numbers]
Write a one-page report: what changed, by how much, and what it might mean. State causes only where the numbers show them. If I left out my numbers for the week, reply only with a Needs input list. Return one report under 200 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm your numbers for the week against the source numbers, not last week's report.

OP-92 Quarter goals

Use when: You are setting goals for the quarter.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what I want to be true in 90 days]; [what I have to work with]; [what I will stop doing]
Turn the list into three goals, each with a number, a date and a first step this week. If a goal cannot be measured from what I gave you, say so. If I left out what I want to be true in 90 days, reply only with a Needs input list. Return three goals. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what you want to be true in 90 days yourself. It is the one fact this prompt refuses to guess.

OP-93 Task list from a brain dump

Use when: Everything is in your head.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [everything I can think of that needs doing, pasted]
Sort the list into this week, this month and later. Mark the three that matter most and anything that can be handed to someone else. If I left out everything that needs doing, reply only with a Needs input list. Return one sorted list. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: everything that needs doing. Match that to your records.

CATEGORY 11 OF 11 | PART 2 OF 3

PLANNING AND REPORTING

OP-91 to OP-99
On this page: OP-94, OP-95, OP-96

OP-94 Delegation brief

Use when: You are handing a task to someone.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the task]; [what done looks like]; [the deadline]; [what they can decide without me]; [when to check in]
Write a brief with those five parts so the person can start without a meeting. If I left out what done looks like, reply only with a Needs input list. Return one brief under 130 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Confirm what done looks like against the source numbers, not last week's report.

OP-95 Risk list

Use when: You want to see what could hurt the business.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [what I depend on: people, vendors, customers, equipment]
List the single points of failure in what I gave you, what would happen if each failed, and one inexpensive step for each. If I left out what I depend on, reply only with a Needs input list. Return one table. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Check what you depend on yourself. It is the one fact this prompt refuses to guess.

OP-96 Process cost check

Use when: A task takes too long.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]
Reader: [who will use or receive this, and their role]
Scenario: [the task]; [how often it is done]; [how long it takes]; [who does it]
Work out the hours per month from my numbers and show the arithmetic. Suggest three ways to cut it and what each would need. If I left out how long it takes, reply only with a Needs input list. Return one calculation and three options. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW
Last look before you hand it over: how long it takes. Match that to your records.

CATEGORY 11 OF 11 | PART 3 OF 3

PLANNING AND REPORTING

OP-91 to OP-99
On this page: OP-97, OP-98, OP-99

OP-97 Customer survey

Use when: You want feedback from customers.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Reader: [who will use or receive this, and their role]

Scenario: [what I most want to learn]; [how I will send it]

Write five questions at most, one of them open, each tied to a decision I could make from the answer. If I left out what I most want to learn, reply only with a Needs input list. Return five questions. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW

Confirm what you most want to learn against the source numbers, not last week's report.

OP-98 Annual plan on a page

Use when: You want next year on one page.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Reader: [who will use or receive this, and their role]

Scenario: [what worked this year]; [what did not]; [the three things I want next year]

Write a one-page plan: the three things, what each needs, what gets dropped to make room, and the first quarter's steps. If I left out the three things I want next year, reply only with a Needs input list. Return one plan under 250 words. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW

Check the three things you want next year yourself. It is the one fact this prompt refuses to guess.

OP-99 Owner's weekly review

Use when: You want a routine for reviewing your own week.

Company brief: [sender, company, offer, coverage area, approved proof, limits, voice]

Reader: [who will use or receive this, and their role]

Scenario: [what I track now]; [how much time I can give it]

Write a review routine that fits the time given: the questions to answer and the numbers to look at, in order. If I left out how much time I can give it, reply only with a Needs input list. Return one routine. Use only the facts above. State no policy, pay figure, date or rule that is not listed above. Put anything I must decide or verify under Owner notes, outside the document.

OWNER REVIEW

Last look before you hand it over: how much time you can give it. Match that to your records.

REVIEW

BEFORE YOU HAND IT OVER

The prompts draft. You verify and hand it over.

BEFORE YOU HAND IT OVER ANY DOCUMENT

- [ ] The reader can act on it without asking you a question.
- [ ] Dates, pay, prices and policies match the source.
- [ ] Nothing states a rule you have not actually set.
- [ ] Hiring, discipline and collections wording has been reviewed.
- [ ] Every task has an owner and a date.
- [ ] Private details about a person are left out.
- [ ] It is dated, and someone owns the next update.
- [ ] It reads naturally out loud, in your voice.

WHAT EVERY PROMPT WILL NOT DO

It will not invent results, proof, names, prices, dates, policies or promises. It cannot check your records, hand it over anything for you, or know what changed since you last looked. Those stay with you.

WHEN IT RETURNS NEEDS INPUT

A fact the prompt will not guess is missing. Supply it and run the prompt again. Do not ask the AI to guess. A Needs input reply is the prompt working as designed.

THE REST OF THE SET

Recon11_Operations_and_Team_Field_Manual_99.pdf explains the briefs, a worked example, and how to measure.
Recon11_99_Operations_and_Team_Prompts.xlsx adds filtering and a results log.
Recon11_99_Operations_and_Team_Prompts.md is the plain-text copy.