

Use this tracker to build AI into your workflow — one week at a time. Check off tasks, capture notes, and track your wins.

WEEK 1

Build the Foundation

- ☐ Write your business context document (who you are, who you serve, your tone)
- ☐ Create a Claude Project and load your context document into it

NOTES

RESULT: AI stops asking who you are — and starts acting like it knows.

WEEK 2

Run Real Work Through It

- ☐ Pick 2–3 real tasks from your week and run each through AI
- ☐ Note what worked, what didn't, and what one tweak fixed it

NOTES

RESULT: You know exactly where AI saves you time — and where it doesn't.

WEEK 3

Build Your Prompt Library

- ☐ Identify the tasks from Week 2 you do repeatedly
- ☐ Write a reusable prompt template for each one
- ☐ Save them inside your Claude Project or a doc you'll actually open

NOTES

RESULT: 2–3 ready-to-use prompts that cut your setup time to zero.

WEEK 4

Take Stock and Plan Month Two

- ☐ What did I actually use AI for this month? (write it down)
- ☐ Where did it save me meaningful time?
- ☐ What didn't work — and why? (usually a prompt problem)
- ☐ What am I still doing manually that follows a pattern?

NOTES

RESULT: A clear list of what to automate next — your Month 2 starting point.

MONTH TWO: EXPAND & AUTOMATE

Once you've built the habit, the next phase is connecting your tools so work happens automatically.

- Email assistants that handle common inquiries
- Workflow automation — so tasks trigger without manual effort
- Content distribution connected directly to your AI drafts
- Support queues, meeting prep, and scheduling workflows

Want help setting this up in your business?

That's exactly what we do at Simply Insilico.

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Month completed on: _____

Biggest win this month: _____