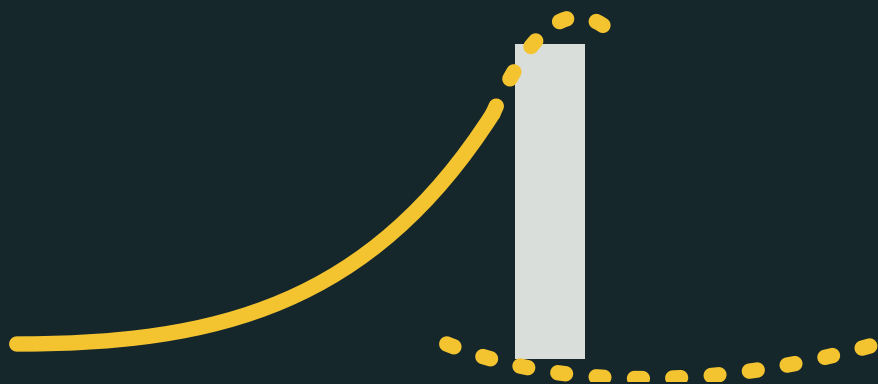


READER PREVIEW

Climb It or Go Around It

Using AI in the job you have, and finding your way when the job is gone



Joe Fernandez

Opening pages and Chapters 1 to 3 · Draft for feedback

A note to early readers

Thank you for reading this early. This preview holds the opening pages and the first three chapters of *Climb It or Go Around It*, the free book I am writing for people whose work is changing because of AI. The rest of the book is still being written: how each field of work is changing, the skills every job shares, one job in depth, the new jobs taking shape, and a part for anyone who has already lost work.

Please keep this preview to yourself for now. It is a draft, and some facts, tool names and prices will change before the book comes out.

Here is what would help me most:

1. Where did you get lost, bored or confused?
2. Which example made you want to try something, and did you try it?
3. When you tried a request, what happened, and which tool did you use, free or paid?
4. What is missing for your kind of work?
5. Would you hand this book to someone who is worried about their job? Why or why not?

Send your notes to joe@thinkmorphic.com, or use the feedback section at thinkmorphic.com/climb. Short notes are welcome, and page numbers help.

Joe Fernandez

In this preview

How to Use This Book

Never Used AI? Start Here

Chapter 1: The Whole Toolbox

Chapter 2: Teach AI Who You Are

Chapter 3: Asking Well and Staying Safe

Reader preview, October 2026. Draft for feedback. Not for sharing or quotation. © 2026 Joe Fernandez, ThinkMorphic Press.

How to Use This Book

This book is for people whose work is changing because of AI: people who have already lost a job, people who are worried they are next, and people who simply want to stay ahead. The book is free because the people who need it most are often the ones least able to pay for one more thing right now.

Read the first part, find your own world, and try one thing this week. The rest you can read in any order.

Draw the LINE

The book follows four letters.

- **L: Learn the tools.** AI is much more than a chatbot. The toolbox chapter covers twelve kinds of tools, from assistants and research tools to images, video, spreadsheets, apps you can build without being a programmer, and automations that connect it all.
- **I: Introduce yourself.** Fifteen minutes of setup so the tools know who you are, what you do and how you like to work.
- **N: Never skip the check.** How to ask so AI understands, how to check what comes back, and how to stay safe.
- **E: Expand your reach.** The rest of the book: how your field is changing, the skills every job shares, one role in depth, the new jobs taking shape, and what to do if you are already at the wall.

Under all four letters sits one rule, the Decision Line. AI does the legwork, and you make the call. Decisions about money,

health and a person's mind, and every promise you make to someone, stays with you.

A path through the book

- If you have never used an AI tool, start with the next page, *Never Used AI? Start Here*.
- Read the three chapters on getting set up. They take a few evenings, and everything after them works better because of them.
- Find your field in the part on how every world is changing, and read that chapter.
- Pick the skill chapters that match your week: organizing information, designing and creating, checking and reviewing, researching, or building products and services.
- If you have already lost work, go to *At the Wall* whenever you need it. You do not have to finish anything else first.

How the Try it yourself sections work

Most chapters include requests you can use word for word. Swap the parts in brackets for your own details. You can type them, or tap the microphone on your phone and say them out loud. Each Try it yourself section in this book ends with a short note on what to check before you use the answer, such as a date, a number or a name. AI tools can still get a fact wrong while sounding sure of it, so a quick check is what makes the answer safe to use.

Tool names change

AI tools change every few months. This book names the major tools where the name helps, and the companion page at thinkmorphic.com/climb keeps the current list, links and

prices. If a feature in the book has moved or been renamed, check the page.

Share what you try

The website also has a short form where you can share a use case: what you were trying to do, what you asked, and what happened. You can also ask for help with something the book does not cover. Every submission is read before anything is posted, names and employers are removed, and the best ones become new examples for other readers.

Never Used AI? Start Here

If you have never typed a single request into an AI tool, this page is for you. All it takes is a phone and about ten minutes. You do not need a computer, and you do not need to know how AI works.

Step 1: Get one app

Download one free assistant app on your phone: ChatGPT, Gemini, Claude or Microsoft Copilot. If you use WhatsApp, Instagram or Facebook, Meta AI is already inside them. Pick one and sign in. You can try others later.

Step 2: Say this out loud

Tap the microphone or the voice button, and say:

I have never used AI before. I work as [your job]. Teach me how to use you, one small step at a time, and give me one thing to try today that would help with my work.

The tool will explain itself in plain words and give you something small to try.

Step 3: Do the one thing

Try what it suggests, on something from your own day. If the answer is not quite right, say what is wrong, the way you would to a new coworker: "Shorter." "Simpler words." "That's not how we do it here. We do it this way."

Make it your coach

An AI assistant is a patient teacher that never gets tired of your questions. After any answer, ask one of these:

- "How could I have asked that better?"
- "What should I learn next?"
- "What in your answer should I double-check?"

Ask them for a few weeks, and you will notice your own requests getting better, often faster than you expect.

Two things to keep out

Do not type in passwords, account numbers or Social Security numbers, and keep customers', patients' and coworkers' details out of a personal account. The chapter on asking well and staying safe explains why, and what to do instead.

If it all feels like a lot

Go slowly. Use one tool for one thing each week. Read only the first section of the toolbox chapter, on assistants, and the setup chapter, and leave the rest until you are ready. Plenty of people start this way and end up using AI every day within a couple of months. When you feel ready for more, the next part of the book is waiting.

Chapter 1: The Whole Toolbox

What AI can do for a working person once you look past the chat box

When most people think of AI, they picture a chat window. You type a question and it types an answer back. That picture leaves out most of what the tools can do for a working person now.

The same tools that answer your questions can draw the picture for a flyer, turn a page of notes into a two-minute training video with a narrator, read a sixty-page contract aloud while you drive, build a small app that tracks your customers, and work through the spreadsheet you have been afraid to open. Some of them will open a web browser and fill in a form for you while you watch.

A lot of people have started. Gallup asked 23,717 U.S. employees about AI in early 2026, and half said they use it at work in some way. When Gallup first asked in 2023, the figure was 21%. Most of those people, though, use one kind of tool for one kind of job. They own a full toolbox and keep reaching for the screwdriver.

I started the same way. I used AI to answer questions and clean up my writing. Over time I learned to talk to it instead of typing, to have it research a topic and teach me, to argue with it when I thought it was wrong, and to build things with it. I am rebuilding my own author website with AI, a job I would once have paid a developer to do. Each new kind of tool opened a door I did not know was there.

Think about how driving has changed. In an older car, you switched on the headlights when it got dark, turned on the wipers when it rained, moved the seat and the mirrors back every time someone else had driven, and adjusted the air for each passenger. Many newer cars do all of that for you. The seat and mirrors move to your profile when you get in, the lights and wipers come on when they are needed, the climate adjusts for who is sitting where, and a camera reads the speed limit signs. The destination stays yours. The car takes the small chores so you can focus on the drive, and in the cars that now drive themselves in some cities, the ride becomes time to talk with the people beside you. AI at work does the same thing. It takes the routine steps off your plate so your attention goes to the part of the job only you can do.

This chapter walks through the whole toolbox, twelve kinds of AI tools in all. For each one you will find what it does in plain words, how people in ordinary jobs use it, one full worked example with the words to type, what to check before you trust the result, what it costs to start, and how getting good at it expands your reach in the job you have. You do not need to try all twelve. Skim the section titles, pick the two or three that fit your work, and come back for the others later.

A word about names

Tool names change faster than any book can keep up with. One of the best-known AI companies launched a video app that shot to the top of the app store, and its maker shut it down within about six months, telling users to download their videos before it closed. Anyone who had built their work around that one app had to start over somewhere else.

So learn the kind of tool and the way of asking. Those carry over from one product to the next. When a tool you rely on

changes or disappears, you will know what to look for, and you can be working again within a day. Keep your own copies of everything you make.

Each section below names a few tools so you have something to search for. The companion page at thinkmorphic.com/climb keeps the current list, organized the same way as this chapter.

A word about plans

Many examples in this book chain several jobs into one request: read the notes, assign the follow-ups and put the reminders on your calendar. The free versions of most assistants handle the reading, writing and organizing well. Steps that act inside your other apps, such as your calendar, your email or a group chat, may need a paid plan, a work account that connects those apps, or a one-time setting that links them. When an example needs one of those and you do not have it, run the first part for free and do the last step yourself. The companion page at thinkmorphic.com/climb keeps a current list of what each plan includes.

1. The assistant you talk to

What it is. A general assistant is the tool most people already know. You can type into it or talk to it, and it can write, explain, summarize, compare, plan, translate and answer follow-up questions. Most of them can also look at a photo you take and tell you what is in it, read a document you upload, and switch to a slower "thinking" mode for harder problems.

The best known are ChatGPT from OpenAI, Claude from Anthropic, Gemini from Google, Copilot from Microsoft, Meta AI from Meta, Grok from xAI and DeepSeek from a Chinese company of the same name.

How they differ. Rankings between them shift every few months, so the most useful difference for you is where each one lives. Gemini is built into Gmail, Google Docs, Google Sheets and most Android phones. Copilot is built into Word, Excel, Outlook and Teams, and it is often the tool an employer provides. Meta AI sits inside WhatsApp, Instagram and Facebook and is free, running on Meta's Muse Spark model. Meta's stronger Muse Wonder model sits behind paid tiers. Grok is tied to the X social network.

Two cautions belong here. DeepSeek's own privacy policy says it stores user data on servers in China. NASA, the Pentagon, several U.S. states and a number of other countries have blocked DeepSeek on government devices for that reason. Meta's privacy policy, as Axios reported when the Muse models launched, places few limits on how the company can use what you share with its AI. You can still use these tools, as long as you keep anything personal, financial or work-related out of them.

For most people the right assistant is the one they will open every day, plus whichever one their employer approves for work.

How working people use it.

- A restaurant manager drafts a staff announcement about a schedule change, in English and Spanish.
- A home health aide asks it to explain a new medication sheet in plain words, with no patient details included.
- A truck driver parked at a rest stop talks through a dispute with a broker and asks how to word his reply.
- A bookkeeper pastes a confusing vendor email and asks what the vendor is asking for.

- A new supervisor role-plays a hard conversation with an employee who keeps coming in late.
- A parent asks it to explain the fine print in a phone contract before signing.

Try it yourself: the schedule change.

The situation. You manage a small restaurant. Starting next month the kitchen opens for Sunday brunch, which means Sunday shifts start at 8 a.m. instead of 11 a.m. Some staff will be unhappy, and two of your line cooks read Spanish more easily than English.

What you need before you ask. The facts (the new start time, the date it begins, how shifts will be assigned, any extra pay), the tone you want, and who will read it.

The words to type or say:

I manage a 25-person restaurant. Starting the first Sunday of next month we open for brunch, so Sunday shifts start at 8 a.m. instead of 11 a.m. Shifts will be assigned by sign-up first, then by rotation if we are short. Anyone working the 8 a.m. Sunday shift gets an extra \$2 an hour. Write a short announcement for the staff group chat that explains the change, why we are doing it, how sign-up works and the extra pay. Friendly and direct, no corporate language, under 150 words. Then give me the same message in Spanish. Before you write, ask me anything you need to know, then tell me your plan in two lines and wait for my OK.

What comes back. A few questions first (when sign-up opens, where the sign-up sheet is), then two versions of the message.

What to check. Every fact: the date, the time and the pay. Read the Spanish version to someone fluent before you post it, because a machine translation can be correct and still sound stiff or slightly off.

Push it further. Ask it to play a restaurant server who is upset about the early start, and practice your answer before anyone brings it up in person.

What it costs to start. Every major assistant has a free version, with apps for iPhone and Android. Paid tiers commonly run about \$20 a month and give you more use, the stronger models and extra features. The newest models usually reach paid tiers first, and free versions can get narrower. Google, for example, limits its free Gemini app to its lightest model, while its paid tiers start at about \$5 a month.

How it expands your reach. The person who writes clearly and quickly becomes the one the team asks to write things: training guides, announcements, procedures and customer letters. Within your current job, that means more say in how the work gets done and more of your words in front of customers and managers.

2. Research with sources

What it is. Research tools search the web, read many pages and come back with an answer and links to where each fact came from. Perplexity was built around this idea. ChatGPT, Gemini and Claude each have a research mode that works for several minutes, reads dozens of sources and returns a written report.

How working people use it.

- A bank teller who wants to become a loan officer compares three licensing courses on cost, time, pass rate and what local banks ask for.
- An HR coordinator compares three training vendors for the company's new-hire program on cost, length and what

employees say about them.

- An electrician has it pull the city's permit rules, fees and inspection checklist for a panel upgrade into one page before quoting the job.
- A small business owner compares four suppliers on price, delivery times and complaints.
- A job seeker has it read a company's recent news, its last annual report and the job posting, and turn them into a one-page brief with five questions to ask in the interview.
- A nurse looks up the published evidence behind a new practice her unit is adopting.

Try it yourself: should the office switch to text reminders?

The situation. You work the front desk at a medical office. Patients miss about one appointment in ten, and the office manager asks you to find out whether a text reminder service would help and which one to choose.

What you need before you ask. Your state, roughly how many appointments the office books each week, and the scheduling system you use now.

The words to type:

I work the front desk at a medical office in Ohio with four providers and about 400 appointments a week. About 10% of patients miss their appointments, and we remind them by phone. Research whether text reminders would help us and give me a short report with sources. I want to know what published studies say about text reminders and missed appointments, three services that work with [our scheduling system] and what each costs, what a medical office needs in place to text patients under HIPAA and the federal rules on texting, and what offices like ours report after switching. Use government and medical journal sources where you can, and tell me which facts came from vendor sites or blogs. Ask me any questions first.

What to check. Open at least the three links that support the facts you care about most and confirm the page says what the AI says it does. Look at the date on every page, since prices and rules change. Watch for "best service" lists written by the services themselves, and have the office manager or your privacy officer confirm the rules on texting patients before anyone signs up.

Push it further. Ask it to turn the report into a one-page recommendation for your office manager, with the cost for a year, the expected drop in missed appointments and the two risks to watch.

What it costs to start. Basic research with sources is free in most tools. The longer research modes usually come with a limited number of free runs, with more on a paid tier.

How it expands your reach. People who can find good information fast, and say how sure they are of it, get asked into decisions. In most jobs, the person who arrives at a meeting with three sourced facts ends up shaping what the team decides.

3. A study partner for your own documents

What it is. Some tools answer only from the documents you give them. You upload a manual, a policy, a set of class notes or a pile of PDFs, and the tool answers questions from those sources and points to the line it used. Google's NotebookLM is the best-known example. Its free version lets you load up to 50 sources into a notebook. It can turn them into a podcast-style conversation between two AI hosts that you can listen to in the car, a narrated video overview, flashcards, a quiz or a mind map. ChatGPT, Claude and Copilot offer a similar idea through projects or notebooks where you keep your files.

How working people use it.

- A new hire loads the employee handbook and the benefits guide and asks what to choose during open enrollment.
- An apprentice electrician loads his study materials and has the tool quiz him every night.
- A paralegal loads a set of public court rulings and asks where they disagree.
- A parent loads the school handbook and finds the rule on make-up exams in seconds.
- A team lead loads three years of meeting notes and asks what was decided about a project and when.

Try it yourself: studying for a certification on your commute.

The situation. You are preparing for a professional exam in six weeks. You have a study guide, the official exam outline and a set of practice questions, and your only free time is a 40-minute drive each way.

What to do. Create a notebook and upload the study guide, the outline and the practice questions. Then ask:

Using only these sources, make an audio overview for someone who works full time and is studying for this exam. Focus on the three topics the exam outline weighs most heavily. Explain them in plain language with examples, and point out where students commonly get confused. Keep it to about 20 minutes.

Listen on the way to work. On the way home, listen again. In the evening, ask:

Give me 15 practice questions on the topics from today's audio overview, one at a time. After each answer, tell me whether I was right and show me the page in the study guide that explains it.

What to check. These tools are strict about where they look and less strict about whether they read it correctly. When an answer matters, click through to the cited passage and read it yourself. Never upload anything your employer treats as confidential to a personal account, and never upload patient or customer records.

Push it further. Ask it to make a one-page cheat sheet of the ten facts you keep getting wrong, and listen to a five-minute audio overview of just those the night before the exam.

What it costs to start. NotebookLM has a free tier with daily limits. Google's paid tiers raise the limits and add the more elaborate video formats.

How it expands your reach. The person who learns fastest picks up the new system, rule or product before anyone else, and coworkers start bringing their questions to that person. People who are good at this also become the team's trainers,

the ones who turn a thick manual into something a new hire can learn in a week.

4. Pictures

What it is. Image tools create a picture from a description, or change a photo you give them. They can swap a background, remove an object, change the lighting, put readable text on a sign or poster, and keep the same character or product consistent across a series of images. Text on images used to come out garbled, and the newer tools handle it far better.

Tools to look up include ChatGPT's image feature, Google's Nano Banana models inside the Gemini app, Midjourney, Adobe Firefly, Canva's built-in AI tools and Microsoft's free image creator.

How working people use it.

- A church volunteer makes a flyer for the fall bake sale.
- A landscaper shows a homeowner what their yard could look like with a stone path and new plantings, before any work starts.
- A teacher makes a set of illustrations for a classroom reading unit.
- A small online seller puts product photos on clean, matching backgrounds.
- A real estate agent shows how an empty room might look furnished, labeled clearly as a virtual staging image.

How to ask for a picture. Image tools respond to visual detail. A good request covers:

- **Subject:** what is in the picture.
- **Setting:** where it is.

- **Style:** photo, illustration, watercolor, flat graphic.
- **Light and mood:** bright morning sun, warm evening light, clean studio light.
- **Framing:** close-up, wide shot, seen from above.
- **Text:** the exact words, in quotation marks, and where they go.
- **Size:** square for Instagram, tall for a phone screen, wide for a banner.
- **What to leave out:** no people, no logos, no clutter.

Try it yourself: a flyer for a side business.

The situation. You do mobile car detailing on weekends and want a flyer for the community board at the grocery store and a square version for social media.

The words to type:

Create a flyer for a mobile car detailing business called "Shine on Wheels." Show a clean dark blue SUV in a driveway in bright morning sun, with water beading on the hood, photographic style. At the top, in bold white letters: "We Come to You." At the bottom: "Interior and exterior detailing. Weekends only. Call or text 555-0142." Leave room in the bottom corner for a QR code. Tall letter-size layout. No people and no car brand logos.

Push it further. "Make the sky less saturated." "Move the phone number higher so it does not crowd the edge." "Now give me a square version for Instagram with only the business name and the words 'We Come to You.'"

What to check. Read every word on the image letter by letter; one wrong digit in a phone number wastes the whole print run. Look for a hidden brand logo on the car, odd hands or faces if there are people, and anything that looks like a real person

who has not agreed to be in your ad. If you sell the work, check the tool's terms for commercial use, which free tiers sometimes exclude. Some industries and platforms require you to say when an image was made or changed with AI, and real estate listings are one place to check the rules before you post.

What it costs to start. Most assistants include image creation in their free tier with daily limits. Dedicated tools such as Midjourney are paid.

How it expands your reach. Most small businesses need a steady stream of images for menus, flyers, social posts and product listings, and few can afford a designer. The person who can produce clean, accurate images quickly takes on the flyers, posts and signs nobody else has time for, and some turn the same skill into side income.

5. Video

What it is. AI video tools come in three kinds.

- **Clip makers** turn a description or a photo into a short video clip, usually a few seconds to a minute long, and some now add matching sound. Google Veo (inside the Gemini app and Google's Flow tool), Kling, Runway, Luma and Pika are names to look up.
- **Presenter tools** turn a script into a video with a narrator or an on-screen presenter, which is useful for training and explainers. HeyGen, Synthesia and Google Vids work this way.
- **Editors** let you edit a recorded video by editing its transcript. Delete a sentence in the text and the video cuts it out. Descript is the best-known example.

How working people use it.

- An HR coordinator makes a 90-second welcome video for new hires.
- A plumber records a short video for customers on how to shut off the main water valve in an emergency.
- A retail shift lead turns the store's opening checklist into a two-minute training video.
- A nonprofit volunteer makes a short appeal for the annual fund drive.
- A teacher makes a three-minute explainer that students can rewatch at home.

Try it yourself: a training video for opening the store.

The situation. You are a shift lead at a hardware store. Every new hire learns the opening routine by shadowing someone for a week, and it is never taught the same way twice. You want one short video everyone watches first.

Step one, the script. Ask your assistant:

Here are our 14 opening steps in the order we do them. Turn them into a narration script for a training video of about two minutes. Group the steps into four parts, use plain words a 17-year-old on their first day would follow, and mark where a short clip or a photo of each step should appear. Point out any step where the order matters for safety.

Step two, the pictures. Take photos or short phone videos of each step in the store yourself. Real footage of your own store beats anything generated. Use a clip maker only for a title shot or a simple transition, for example:

A five-second slow pan across the front of a small neighborhood hardware store at sunrise, warm light, the doors opening, no people, no store name visible.

Step three, the voice and the edit. Record the narration in your own voice, or use a presenter tool's voice, and assemble everything in an editor. Add captions; many new hires will watch without sound.

What to check. Watch the finished video with the most experienced opener in the store. A safety step taught wrong in a video gets taught wrong to every person who watches it. Never put a real person's face or voice into a video without their permission, and get your manager's approval before anything goes on a public channel.

Push it further. Ask for a 15-second version for social media and a Spanish caption track, so the same video works for customers and for every new hire.

What it costs to start. Most clip makers and presenter tools give a small number of free credits, and paid tiers start at a few dollars a month for the low-cost tools and rise from there. Short clips from your phone plus a simple editor cost nothing.

How it expands your reach. Every business with more than a handful of people has training it repeats by hand. The person who turns that training into short videos saves the team hours with every new hire and becomes the one people turn to when something needs explaining.

6. Voice, sound and music

What it is. Audio tools turn text into natural-sounding speech in dozens of languages, turn speech into text, translate a recording into another language in a similar voice, and create music from a description. ElevenLabs is a leader in voices, and Suno is the best-known music tool. Every major assistant also has a voice mode, so you can hold a spoken conversation with it while your hands are busy.

How working people use it.

- A truck driver has the assistant read his study material aloud and quiz him by voice between loads.
- A crew foreman gives the weekly safety talk in English and Spanish.
- A small business records a clear, professional phone greeting.
- A teacher makes audio versions of reading passages for students who learn better by listening.
- A podcaster adds a short music intro that she is allowed to use commercially.

Try it yourself: the weekly safety talk in two languages.

The situation. You run a small construction crew. Half the crew is more comfortable in Spanish, and the weekly safety talk loses them.

The words to type:

Write a two-minute safety talk for a residential construction crew on ladder safety: setting the angle, three points of contact, and never standing on the top two rungs. Plain, spoken language, like a foreman talking to his crew at 7 a.m. Then give me the same talk in Spanish as it would be said on a job site in Texas. Mark anything I should double-check with OSHA's guidance on ladders.

Then paste each version into a voice tool to produce an audio file the crew can replay on their phones.

What to check. Have a bilingual crew member listen to the Spanish version before you play it for everyone. Check the safety facts against OSHA's own ladder guidance.

A rule that matters. Never copy someone else's voice without their clear permission. Reputable tools ask you to prove consent before they will clone a voice, and scammers use cloned voices to call families pretending to be a relative in trouble. A family code word that only your household knows is a simple defense.

On music. Free tiers of music tools are usually for personal use only. Suno's paid tiers include commercial rights, ElevenLabs licenses its music by tier, and whether purely AI-made music can be copyrighted at all is still unsettled. For anything you sell or broadcast, read the tier's terms first.

Push it further. Ask it to turn the talk into five quick questions you can ask the crew at the end, in both languages, so you know the message landed.

What it costs to start. Voice modes in assistants are free or included. Dedicated voice and music tools have free tiers and paid tiers starting at a few dollars a month.

How it expands your reach. Translation, narration and accessibility work all grow with these tools. Within your own job, a bilingual worker who can produce clear training audio in two languages makes sure the whole crew hears the message, and any employer with a mixed workforce values that.

7. Slides, documents and design

What it is. Design tools turn an outline or a rough idea into finished slides, one-page handouts, brochures, resumes and simple app screens. Gamma builds presentations and web pages from a prompt. Canva has AI built into its design tools. Google Slides works with Gemini, PowerPoint works with Copilot, and Figma's AI tools sketch app screens from a description.

How working people use it.

- A sales representative builds a ten-slide pitch for a prospect from her call notes.
- A project coordinator turns a status update into four clean slides for leadership.
- A cleaning company owner makes a one-page brochure for office buildings.
- A job seeker lays out a resume that reads cleanly on a phone screen.
- A restaurant owner redesigns the menu after a price change.

Try it yourself: a proposal to win a contract.

The situation. You own a small commercial cleaning business and want the cleaning contract for a three-story office building. The property manager asked for a short proposal by Friday.

Step one, the thinking. In your assistant:

I own a commercial cleaning company with 9 employees. I want to win the nightly cleaning contract for a three-story, 40,000-square-foot office building. The property manager cares most about reliability, because the last company missed nights. Here are my notes on our services, our insurance, three current clients and our pricing approach. Draft the outline for a ten-slide proposal: what goes on each slide, the one sentence the manager should remember from each, and where I need a number or a photo. Ask me any questions first.

Step two, the design. Paste the approved outline into a design tool and ask for a clean, professional style in your company colors. Replace stock photos with real photos of your team at work wherever you can.

What to check. Every number, every client name and every promise. Make sure you have each current client's permission before naming them. Check that stock images are licensed for business use and that the text is large enough to read when the slides are printed.

Push it further. Ask it to play the property manager and raise the three toughest objections to your proposal, then practice your answers before the meeting.

What it costs to start. Most design tools have free tiers with limits on AI use, and paid tiers in the range of \$10 to \$20 a month.

How it expands your reach. The person who can turn a messy set of notes into a clear, good-looking story gets put in front of customers and leaders, and small companies that present well win bigger work.

8. Numbers and spreadsheets

What it is. You can upload a spreadsheet to most assistants and ask questions about it in plain words. Behind the scenes, the better tools write and run small pieces of code to do the math, which is more reliable than having the AI calculate in its head. They can find patterns, build charts, flag rows that look wrong and explain what changed between two months. Copilot works inside Excel, and Gemini works inside Google Sheets.

How working people use it.

- A restaurant owner finds which dishes make money and which ones lose it.
- An accounts payable clerk finds possible duplicate invoices in a year of payments.

- A property manager sees which buildings generate the most repair calls and for what.
- A teacher looks at grade trends across a semester.
- A family tracks spending against a budget and sees where the money went.

Try it yourself: which dishes lose money?

The situation. You own a small diner. Food costs went up and you suspect a few items on the menu now lose money, but you do not know which.

What you need. Three months of sales by menu item from your register system, and a list of ingredients and current costs for each dish. Take out anything about individual customers.

The words to type:

I am uploading two files: three months of sales by menu item, and ingredient costs per dish. For each dish, calculate the food cost per plate, the food cost as a percentage of the menu price, and the total profit after food cost over the three months. Rank the dishes from most to least profitable and make a bar chart. Flag any dish where food cost is above 35% of the price. Show me how you calculated one dish step by step so I can check your method, and tell me if any rows in my files look wrong or incomplete.

What to check. Work out two or three dishes by hand and compare. Check that the total sales in the AI's answer match the total in your register report. AI tools can misread a column, especially when a spreadsheet has merged cells or notes in the margins. Precise math is one of the places where these tools can be confidently wrong, so the step-by-step check is part of the job.

Push it further. "Suggest three ways to bring the worst two dishes under 35%, with what each change would do to the plate cost." Then decide for yourself; you know your customers.

What it costs to start. Spreadsheet uploads and analysis work in most free tiers with limits. The tools built into Excel and Sheets usually come with a paid tier.

How it expands your reach. Every team has someone who becomes "the numbers person," and that person gets asked into decisions. You can become that person without a degree in math, and the chapter on organizing information and data shows the first steps.

9. Building software without being a programmer

What it is. You can now describe a small app in plain words and have AI build it. People call this "vibe coding." Some tools hide the code completely: you describe what you want, watch it appear and keep asking for changes. Lovable, Replit, Bolt and v0 work that way. Others work with the code directly and suit people willing to learn a little: Claude Code, Cursor, GitHub Copilot and OpenAI's Codex. Most assistants can also build a simple one-page tool, such as a calculator or a checklist, right inside the chat.

How working people use it.

- A handyman builds a quote calculator he can use on his phone in a customer's kitchen.
- A landscaping crew lead builds a simple job tracker with addresses, dates and photos.
- A tutor builds a flashcard app for her students.
- An office manager automates a weekly report that used to take two hours of copying and pasting.

- A nonprofit volunteer builds a sign-up page for an event.

Try it yourself: a painting quote calculator.

The situation. You paint houses. Quoting takes you twenty minutes of math on a notepad, and customers want a number before you leave.

The words to type:

Build me a simple web app I can use on my phone to quote interior painting jobs. I enter each room's length, width and ceiling height, the number of doors and windows, how many coats, and whether ceilings and trim are included. It should calculate wall area minus doors and windows, gallons of paint needed at 350 square feet per gallon per coat, paint cost at a price I can change, labor hours at a rate I can change, and a total. Show a simple itemized summary I can show the customer. Before you build anything, ask me any questions, then describe what you will build in a few lines and wait for my OK.

What to check. Test it against three jobs you already quoted by hand. If the numbers differ, ask it to show the formula it used and fix the one that is wrong. Do not collect customer names, addresses or payments in an app like this until someone who understands security has reviewed it. These tools are quick at the first 70 or 80% of an app and often stall on the last part, which is where a developer can help.

Push it further. Once the calculator works, ask it to add a button that turns the quote into a short, friendly text message you can send the customer from the driveway.

What it costs to start. Most of these tools have free tiers, and paid tiers commonly start around \$20 to \$25 a month. Usage-based billing can add up when a project runs long, so watch your credits.

How it expands your reach. Small businesses need small tools, and very few can afford custom software. The person who can build a quote calculator, a booking page or a tracker for their own team saves everyone time every week, and the chapter on building products and services picks up from here.

10. Meetings, calls and notes

What it is. Transcription and note-taking tools record a meeting or a call, turn it into text, and then summarize it into decisions, action items and open questions. They are built into Zoom, Microsoft Teams and Google Meet, and there are standalone tools such as Otter. In medicine, "ambient scribe" tools listen to a doctor's visit, with the patient's consent, and draft the clinical note. One large medical group estimated its doctors saved more than 15,000 hours of documentation this way across 2.5 million patient visits.

How working people use it.

- A project manager gets a clean list of who agreed to do what, by when.
- A sales representative captures what a customer asked for without typing during the call.
- A student records a lecture and turns it into study notes.
- A nurse documents through the hospital's approved tool, never a personal app.
- A volunteer board secretary turns a two-hour meeting into minutes.

Try it yourself: a meeting that ends with clear next steps.

The words to type, after pasting a meeting transcript:

Here is the transcript of today's 45-minute team meeting. List the decisions made, the action items with the person responsible and the due date, and the questions still open. If a task was mentioned but nobody agreed to own it, list it separately. Then draft a short follow-up email to the team that confirms the action items. Use the names exactly as they appear in the transcript.

What to check. Make sure the right name is attached to each task, since transcripts mix up speakers. Watch for jokes or side comments that got turned into decisions. Before you record anyone, get their agreement. Recording laws vary by state, and some states, including California, require everyone on the call to agree.

Push it further. Paste last month's meeting transcript too, and ask which of today's decisions conflict with what the team agreed before.

What it costs to start. Basic transcription is built into most meeting tools and phones. Standalone note-takers have free tiers with monthly limits.

How it expands your reach. The person who reliably turns a meeting into clear next steps becomes the person who runs the meetings, and the one the team trusts to keep work on track.

11. Agents that act for you

What it is. An agent does tasks on the web for you. You describe the goal, and it opens a browser, searches, compares, fills in forms, gathers results into a table, and in some cases adds items to a cart or books a table, while you watch. ChatGPT, Gemini, Claude and Meta's new Muse agent all offer agent features, mostly on paid tiers, and there are AI web

browsers built around the same idea, such as Perplexity's Comet and OpenAI's Atlas.

How working people use it.

- An office manager compares prices on the same printer toner across five suppliers.
- A job seeker gathers every matching posting within 25 miles into one table.
- A grant writer has an agent pull the requirements from six foundation websites into a checklist.
- A busy parent compares summer camp dates, prices and pickup times.

Try it yourself: a supplier price check.

The words to type:

Check the current prices for these eight office supplies on the websites of [five suppliers]: [list each item with its size or pack count]. Put them in a table with the price per unit, shipping cost, delivery time, any minimum order and the link for each. Flag the cheapest supplier overall and any item where one supplier is far cheaper. Do not order anything, create any accounts or enter any of my information. If any step would send, submit or sign up for something, stop and ask me first.

What to check. Open a few links to confirm each price is current and matches the same item and size. Agents can misread a page or pick up an old listing.

The rules that keep you safe. Never give an agent your passwords, card numbers or Social Security number to type in. Watch it work, especially the first few times. Websites can contain hidden text written to trick an agent into doing something you did not ask for, which is one more reason to keep it away from your bank, email and work accounts unless

you are watching every step. Tell it plainly where to stop, as in the example above.

Push it further. Give it last year's order quantities and ask what the office would save in a year by switching, with the math shown.

What it costs to start. Agent features are mostly on paid tiers, often with a monthly limit on tasks.

How it expands your reach. Small businesses are full of repeated web chores: checking prices, gathering leads, filling in the same supplier forms. The person who learns to hand those chores to an agent safely, with a person approving every step that matters, gives the whole team hours back each week.

12. Automations that connect your tools

What it is. Most of the tools in this chapter work one at a time: you ask, and they answer. Automation tools connect them, so work moves from one app to the next without you copying and pasting. You set a trigger, such as "when someone fills in my website form," and then the steps that follow, such as "add a row to my spreadsheet, have AI draft a reply, and text me to approve it." Zapier, Make and Microsoft Power Automate are the best known, and n8n is a free, open-source option for people willing to set it up themselves. Most of them now let you describe the automation in plain words and build a first version for you.

Watch this kind of tool closely, because it shows where the world is moving. AI tools are shifting from answering questions to carrying out work, and the person's job is shifting from doing each step to designing the steps and checking the result. One person with a few connected tools can now run work that used to need a small team.

How working people use it.

- A landscaping company owner gets every website inquiry added to a spreadsheet and a text on his phone within a minute.
- A bookkeeper has every invoice sent to one email address read, logged in a spreadsheet and flagged when the amount looks unusual.
- A teacher turns quiz results from a form into gradebook entries and a short note to each parent, which she reviews before it goes out.
- A real estate agent gets a drafted follow-up email for every open house sign-in, waiting for her approval.
- A volunteer coordinator sends shift reminders the day before, every week, without lifting a finger.

Try it yourself: never lose a customer inquiry again.

The situation. You run a small cleaning business. Inquiries come in through the form on your website. Some get an answer within an hour, some within three days, and a few never get one. Each lost inquiry is a lost job.

What you need. A free account on an automation tool, the form tool you already use (Google Forms, Microsoft Forms or your website's own form), a spreadsheet, and your phone.

What is known going in. An automation does exactly what you set it to do, every time, including the wrong thing. Start with one simple flow, test it with made-up entries, and add steps only after the first one works.

The words to type, in the automation tool's AI builder:

When someone submits my website contact form, add their name, phone, email, the service they asked for and their

message as a new row in my "Inquiries" spreadsheet, with today's date. Then use AI to draft a friendly two-sentence reply that thanks them, confirms the service they asked about and says I will call within one business day. Send the draft to me as a phone notification so I can approve or edit it. Never send anything to a customer without my approval.

What comes back. A draft automation laid out as a chain of steps you can click to change.

What to check. Submit three test inquiries with made-up details and follow each one all the way through. Make sure nothing reaches a customer without your approval, the spreadsheet columns line up, and the AI draft never promises a price or a date. Check where the automation tool stores your data, and never collect card numbers or other sensitive details in the form.

Push it further. Add a step that checks the spreadsheet every morning and texts you any inquiry older than one day that still has no reply.

What it costs to start. The major automation tools have free tiers with a monthly limit on how many steps run. Zapier's free tier, for example, allows two-step automations and a limited number of tasks a month. Paid tiers commonly start at about \$20 to \$30 a month. If your employer already pays for Microsoft 365 or Google Workspace, some automation may already be included.

How it expands your reach. Every business is full of steps someone does by copying and pasting. The person who can spot those steps, connect the tools and keep a person approving the parts that matter becomes the one the team counts on to keep work moving. The chapters on skills everyone shares build on this one.

Every tool is also a teacher

Across all twelve kinds of tools there is one use that matters more than the rest. Any of them will teach you how to use it, and the assistants will teach you almost anything else.

When I want to learn something new, I ask the AI to teach me one step at a time, check my understanding and quiz me. You can do the same with a request like this:

I want to learn how to build a pivot table in Excel. I know basic formulas and nothing else. Teach me one small step at a time using an example about monthly sales by store. After each step, give me a short task to try, wait for my answer, and correct me before moving on.

Swap in whatever you want to learn: reading a profit and loss statement, the basics of medical terminology, how a home electrical panel works, conversational Spanish for a job site. A patient teacher who never gets tired of your questions is now available at any hour, and most of the time it is free.

What every toolmaker's own advice agrees on

Each AI company publishes its own guide to asking well, and they use different words for the same ideas.

Google teaches four parts for Gemini: **persona** (who you are), **task** (what you need), **context** (the background) and **format** (how the answer should look).

Microsoft teaches four parts for Copilot: **goal**, **context**, **source** (which documents or emails to draw on) and **expectations** (how the response should be shaped).

OpenAI's and Anthropic's guides cover the same ground and add a few habits of their own: be clear and direct, give examples of what good looks like, break a large job into steps,

give the model room to think before it answers, and review what comes back.

Put side by side, almost every guide comes down to the same six things, and the chapter on asking well later in this part covers them in depth:

What to include	Google's word	Microsoft's word	In plain terms
Who you are and who it is for	Persona	Context	"I'm a shift lead writing for new hires."
What you need done	Task	Goal	One clear job per request.
The background	Context	Context	Why you need it, what has happened so far.
What to work from	Context	Source	The notes, file or data to use.
What the answer should look like	Format	Expectations	Length, tone, layout, language.
How to proceed			Ask first, tell me the plan, wait for my OK.

The last row in the table is my own addition, drawn from how I work. I add it to almost every bigger request, because it keeps me in charge of the work and stops the tool from running ahead on a wrong guess.

Pictures and video need a different kind of detail, because the tool is building something you will look at. For those, describe the subject, the action, the setting, the style, the light, the framing or camera movement, any sound, the length or size, and anything to leave out.

One finding from Google's guide surprised me. In its early testing, the requests that worked best averaged about 21 words. Mine are often much longer, because I include the

background the tool needs. When you are starting out, write the full request with all six parts. Once you have saved a profile, which the next chapter shows you how to do, the tool already knows who you are and how you like to work, and your requests can get shorter.

Where to start

You do not need twelve tools. Pick by what you want to get done.

If you want to...	Start with...
Write, explain or think something through	An assistant (section 1)
Find out what is true and where it came from	A research tool (section 2)
Learn a manual, a course or a pile of documents	A study partner (section 3)
Make a flyer, a product photo or an illustration	An image tool (section 4)
Teach a process or explain something on screen	Your phone camera plus a video editor (section 5)
Reach people in another language, or listen while you work	Voice and audio tools (section 6)
Win a customer or brief a leader	A design tool (section 7)
Understand your numbers	Spreadsheet analysis (section 8)
Stop doing the same calculation or chore by hand	A vibe coding tool (section 9)
Leave every meeting with clear next steps	A note-taker (section 10)
Hand off a repeated web chore	An agent, watched closely (section 11)
Stop copying and pasting between apps	An automation tool (section 12)

Start free. Use one tool for real work for two weeks before you pay for anything, and when you do pay, one paid tier is usually enough at first. Most people who end up paying for three subscriptions only ever use one.

How the tools work together: Dana's ninety days

Dana is a composite, built from the kinds of roles and small businesses described in this chapter to show how the tools combine.

Dana was the office assistant at a family-owned landscaping company with twelve employees. She answered the phone, scheduled estimates, sent invoices and kept the owner's calendar. When the owner mentioned that the company's website had not been updated in years and that he could not afford a marketing agency, Dana asked whether she could try something.

The first month: learn and listen. Dana set up her assistant with a short profile of the company and how she wanted answers written. She loaded the company's price sheet, service list and two years of customer reviews into a study partner and asked what customers praised most and complained about most. The answer surprised the owner: customers loved the crew's reliability and hated not knowing when the crew would arrive. Dana had been answering those calls for years without seeing the pattern.

The second month: make things. Dana used an image tool to create "before and after" design concepts for three types of yards, clearly labeled as concepts, to show homeowners during estimates. She filmed the crew on two jobs with her phone and used a video editor to cut a 60-second clip for social media, with the owner's permission and the crew's. She used her assistant to rewrite the website's service pages in plain

language. Then she used a vibe coding tool to build a simple text-message reminder that told customers the day before when the crew would arrive, which went straight to the top complaint.

The third month: show the numbers. Dana uploaded a year of estimates and jobs into her assistant and asked how many estimates turned into jobs, how long that took, and how the numbers changed after the reminder messages started. She turned the answer into a five-slide summary with a design tool and showed it to the owner. Calls asking "when is the crew coming?" had dropped, and two new customers said they found the company through the video.

The owner gave Dana a new title, marketing and operations coordinator, with a raise, and moved the phone work to a part-time hire. Six months later, two other small businesses that had seen the company's videos asked Dana whether she could do the same for them. She now does that on weekends for a flat monthly fee.

Dana got there without learning to code or going back to school. She used the tools in this chapter as a toolbox, one job at a time, and she kept her boss informed at every step. The field and skill chapters that follow show how the same tools fit specific kinds of work.

What none of these tools will do for you

Every tool in this chapter can be wrong in a confident voice. Every one of them changes, and some will disappear. None of them can take responsibility for what you send, give consent on someone else's behalf, or decide what is fair to a customer. Those stay with you.

I call this the **Decision Line**. On one side sits everything AI can do for you: the research, the reading, the first drafts, the numbers and the paperwork. On the other side sit the decisions about money, about health and about a person's mind, and every promise you make to a customer. Those stay with people. A financial advisor can let AI do the research and still make the call with the client. A nurse can let it draft the notes and still decide what the patient needs. The people who gain the most from AI are the ones who hand it the legwork and spend the time they get back on their side of the line, with the people they serve. They see more clients, answer more questions and do more with less.

The chapter on asking well and staying safe covers the rules in more detail. Four of them apply to every tool here. Check every fact, number and name before it leaves your hands. Keep personal, customer and confidential work information out of personal accounts. Get permission before you use anyone's face, voice or words. Keep copies of what you make, outside the tool.

Your next step

Pick three tools from this chapter: one you already use, one that fits your work, and one that looks like fun. Try each one this week on something real, using the worked example from its section as your starting point.

Before you do, spend fifteen minutes on the next chapter. Every tool in this chapter gives better results once it knows who you are, what you do and how you like to work, and the next chapter shows how to set that up once so you never have to explain yourself from scratch again.

Behind this chapter

The tools named in this chapter were checked against product pages, news reports and independent reviews. Names, prices and limits change often, and the companion page at thinkmorphic.com/climb carries the current list.

- **Gallup on AI at work.** Gallup surveyed 23,717 U.S. employees between February 4 and February 19, 2026, and found that 50% used AI at work in some way. The 2023 comparison figure of 21% comes from the Associated Press report on Gallup's earlier survey.
- **The video app shutdown.** OpenAI announced on March 24, 2026 that it was discontinuing its Sora app and API, as reported by Axios, and told users how to save their videos.
- **Meta's Muse models and privacy.** Axios reported Meta's launch of Muse Spark in April 2026 and noted that Meta's privacy policy sets few limits on how it can use data shared with its AI. Meta released its stronger Muse Wonder model on October 12, 2026, behind paid plans, as reported by TechCrunch.
- **New models on paid tiers first.** Google released Gemini 4 Argon to trusted cyber defenders first, then to Google AI Pro and Ultra subscribers on October 13, 2026, according to Google's own posts. From October 9, Google limited its free Gemini app to its lightest model, as reported by PPC Land.
- **DeepSeek.** TechCrunch and CFO Dive reported DeepSeek's statement that it stores user data on servers in China and listed the agencies, states and countries that blocked it on government devices.
- **Medical scribes.** The Permanente Medical Group's estimate of 15,791 hours of documentation saved across 2.5 million

patient encounters, as reported by the American Medical Association.

- **Vendor prompting guides.** Google's Prompting Guide 101 for Gemini (persona, task, context, format, and the 21-word finding), Microsoft's guidance for Copilot (goal, context, source, expectations), and the prompt engineering guides from OpenAI and Anthropic.

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Chapter 2: Teach AI Who You Are

The fifteen minutes of setup that make every request in this book work better

Imagine a temp worker who shows up at your desk every morning. They are smart, fast and willing, and they forget everything about you overnight. Every day you explain who you are, what the job is, who the customers are and how you like things done. By the time you finish explaining, you could have done half the work yourself.

Most people use AI that way. They open a fresh chat, type a short request and get an answer written for nobody in particular. The answer is generic because the request gave the tool nothing to work with. Then they decide AI is not much use for their job.

Every major AI tool now has a place where you can tell it, once, who you are and how you want it to work. Some tools also remember what you have told them across conversations. When you set this up, the temp worker stops forgetting. Your short requests start getting answers written for your job, your customers and your way of working.

I learned this slowly. My first instructions were a few lines about who I am and how I like answers written. Every time the AI got something wrong in the same way twice, I added a line. Over many months my instructions grew past two hundred lines, and I now keep several separate modes for different kinds of work: one for writing to busy executives, one for teaching, one for checking numbers, and my favorite, a mode

for thinking deeply about a hard decision. You do not need two hundred lines. You need six to start, and the habit of adding one when the tool keeps making the same mistake.

This chapter shows you how to set up your AI tools. If you skip it, every request in the rest of this book will still work, but you will spend more time explaining yourself and fixing answers that missed the point.

The same question, two answers

Here is a request a lot of people make:

Help me write a message asking my manager for Friday off.

With no setup, a typical answer comes back as a formal email, about 150 words long, with a subject line, a polite opening paragraph, an offer to "ensure a smooth handover" and a closing line thanking the manager for their consideration. The message is fine, and it sounds nothing like you, which your manager would notice right away.

Now give the tool six lines about yourself first:

I work the front desk at a busy dental office with four dentists. My manager is the office manager, and we talk by text, never by email. I write short, friendly and direct. No corporate language. I am in my second year here and I have not taken a day off since March. When a request is unclear, ask me one question before you write.

Ask the same question, and the tool asks back: "Do you want to mention who will cover the front desk?" You answer that Maria offered to cover. What comes back is something like this:

Hi Linda, could I take this Friday off? Maria said she can cover the front desk, and I'll make sure Thursday's confirmations are all done before I leave. Thanks!

Same question, same tool. The second answer took you five seconds to send. The difference is that the tool knew who was asking. The same setup carries into bigger jobs: a week of messages, a schedule or a report comes back in your voice on the first try instead of the third.

What to tell AI: five layers

You can build your setup in five layers. Start with the first two. Add the others as you go.

Layer 1: Who you are

A few sentences about your job, your workplace and the people you write for. Every answer needs this context, and almost nobody gives it.

- Your role and what your day mostly involves.
- The kind of place you work, in general terms: "a small family-owned landscaping company," "a 300-bed hospital," "a regional trucking company."
- Who reads what you write: customers, patients, your manager, your crew, a client.
- Anything about your situation that changes the answer, such as "English is my second language," "I am studying for a certification," or "I am looking for a new job."

Leave out names of real customers, patients or coworkers, and anything your employer treats as confidential. "A small dental office" tells the tool everything it needs.

Layer 2: How you want answers

This layer stops the tool from writing in a voice that is not yours.

- Length: "Keep answers short unless I ask for detail."
- Tone: "Friendly and direct," "Plain words, no buzzwords," "Professional but warm."
- Format: "Use short bullet points for steps," "Give me text I can paste into a text message," "No headings for short answers."
- Language and spelling: "American English," or "Give me Spanish and English versions of anything for the crew."
- Words and habits to avoid: if the tool keeps using a phrase or a style you never would, tell it to stop.

Layer 3: Working rules

These are the lines that make the tool safer and more honest with you. They matter most when the work matters.

- "Before a bigger task, ask me your questions first, then tell me your plan in a few lines and wait for my OK."
- "If you are not sure about a fact, say so. Never make up names, numbers, dates or quotes."
- "Separate what you know from what you are assuming."
- "If you think I am wrong, tell me and explain why."

That last line deserves a word. AI tools tend to agree with the person using them. If you tell yours to push back, it will catch mistakes you would otherwise send out with your name on them. Never set up your tool to flatter you or to always agree. You will get worse answers, and you will not know it.

Layer 4: Modes for jobs you repeat

Once your basic setup is working, you will notice that some kinds of work need a different approach. Writing to a busy executive needs the conclusion first and nothing extra. Teaching a new hire needs patience and examples. Thinking through a big decision needs the tool to slow down and look for what you missed.

Instead of explaining that every time, you can save each one as a mode. Different tools call these by different names, which the table later in this chapter lists. If your tool has no place to save modes, keep each one in a note on your phone and paste it at the start of a chat. I keep mine as short text files, so I can carry them from one tool to another.

Here is my favorite, written so you can use it yourself. I call it think-deep:

Think-deep mode. Use this when I am working through a decision, a plan or a problem with real consequences. Complete your analysis before you give me a conclusion. Check every number, date and total. Separate confirmed facts from assumptions and from your own interpretation. Point out anything that conflicts, anything missing, and any conclusion the evidence does not support. Then tell me the weak assumptions in my thinking, other explanations I may have missed, the people who might object and why, the risks and what this depends on, the second-order effects, what happens if I do nothing, and what could get in the way of doing it. Do not invent decisions, dates, owners or approvals. End with your conclusion and how sure you are of it.

Think-deep turns the tool from an answer machine into a thinking partner that argues with you. I use it before any decision I would hate to get wrong: a job offer, a big purchase, a plan I am about to put in front of other people.

A few other modes worth setting up:

- **Boss-ready.** "Lead with the conclusion. Focus on cost, schedule, people and risk. Write for a busy manager who will read the first three lines. Keep it short enough to paste into an email or a chat message."
- **Teach me.** "Teach me one small step at a time. Use an everyday example. After each step, give me a short exercise, wait for my answer and correct me before moving on."
- **Check my work.** "Review what I paste for errors, gaps, unclear sentences and anything a skeptical reader would question. List the problems in order of importance. Do not rewrite it unless I ask."
- **Customer-ready.** "Write for a customer who is not an expert and may be upset. Acknowledge the problem once, explain in plain words, say exactly what happens next and when."

Layer 5: Memory

Many tools can now remember things about you across conversations, either because you asked them to ("Remember that I work night shifts") or because they picked up details from earlier chats. Memory makes your setup grow on its own.

It also means the tool can hold on to things you would rather it forgot, or facts that are no longer true. Three habits keep memory working for you:

- **Ask what it remembers.** In most tools, you can type "What do you remember about me?" and get a list. Read it every month or two.
- **Correct and delete.** Say "Forget that" or "Update that: I moved to the day shift," or open the memory settings and delete what you do not want kept.

- **Use a temporary chat for anything sensitive.** Most tools offer a private or temporary chat that is not saved to memory. Use it for one-off questions you do not want shaping future answers.

Your employer's AI tool may have memory turned off, or may handle it differently. Follow your company's rules for anything work-related.

Your first six lines

Here is a template. Fill in the brackets, paste it into your tool's personalization settings, and you are set up.

About me: I work as [your job] at [the kind of place you work]. My day is mostly [the three or four things that take most of your time]. I usually write for [who reads your work].

How I want answers: [Short or detailed], [tone], in [language]. Give me [the format you use most: text messages, emails, checklists, bullet points].

Before you start: If my request is unclear, ask me up to three questions first. For bigger tasks, tell me your plan in a few lines and wait for my OK.

Accuracy: Never make up names, numbers, dates or quotes. Tell me when you are guessing.

Push back: If you think I am wrong or missing something, tell me.

Privacy: I will not share customer, patient or account details with you, so do not ask for them.

Two filled-in examples

An office assistant:

About me: I work as the office assistant at a family-owned landscaping company with twelve employees. My day is mostly answering calls, scheduling estimates, sending invoices and keeping the owner's calendar. I usually write for homeowners and for the owner.

How I want answers: Short, friendly and plain, in American English. Give me text I can paste into a text message or a short email.

Before you start: If my request is unclear, ask me up to three questions first. For bigger tasks, tell me your plan in a few lines and wait for my OK.

Accuracy: Never make up names, numbers, dates or quotes. Tell me when you are guessing.

Push back: If you think I am wrong or missing something, tell me.

Privacy: I will not share customer addresses or payment details with you, so do not ask for them.

A self-employed handyman:

About me: I run a one-person handyman business. Most jobs are small repairs, painting and fixture installs for homeowners. I spend my time on jobs, quoting, buying materials and answering customer texts. I am good with my hands and slow at paperwork.

How I want answers: Very short. Use plain words and numbers. Give me quotes and messages I can send from my phone. Spanish and English when I ask.

Before you start: If my request is unclear, ask me one question first.

Accuracy: Show your math on anything to do with materials or money. Tell me when you are guessing.

Push back: If my price looks too low for the work, tell me.

Privacy: I will not share customer addresses or card details with you.

The deep dives later in this book each end with a starter profile for that job, and the skill chapters show versions for different kinds of work, so you can begin with something closer to your own work and adjust it.

Where each tool keeps your setup

Every major assistant has a place for your setup, and most have a place for modes and memory. The names change often, so the companion page at thinkmorphic.com/climb keeps the current list, but this table will get you started.

Tool	Your basic setup	Modes for repeated jobs	Memory
ChatGPT	Custom instructions, under Personalization	Projects, and custom GPTs	Saved memories, which you can view and delete under Personalization
Claude	Instructions for Claude, under Settings	Projects with their own instructions, and skills	Memory of past chats, which you can turn on or off

Gemini	Personal context settings	Gems, which Google is turning into Skills from November 2026; Skills are free on personal accounts	Memory of past chats, under Personal context, on by default
Microsoft Copilot	Custom instructions, under Chat settings and Personalization	Varies by version and by what your employer has enabled	Copilot Memory, which you can review in the same settings
Meta AI, Grok, Perplexity and others	Look for "personalization," "instructions" or "profile" in settings	Varies	Varies; ask the tool what it remembers

Two tips apply to every tool. First, after you save your setup, start a new chat and ask, "What do you know about how I want you to work?" If the answer does not match what you wrote, the setup did not save. Second, if your setup is long, the tool may follow the first lines more closely than the last ones, so put the rules that matter most at the top.

Put AI in your pocket

Every major assistant in this book has a free app for both iPhone and Android. Download the one you set up and sign in with the same account, and your setup and memory come with you. You carry your phone everywhere, so your assistant is always within reach: in the truck between jobs, in the break room, on the walk to the bus.

Most of these apps also let you talk instead of type. Tap the microphone or the voice button and speak the way you would to a coworker. A messy problem you can explain out loud in thirty seconds might take five minutes to type, and most apps

can answer out loud too, so you can work through a question hands-free. For many people, voice is the quickest way to get more done with AI, and it is already on the phone in your pocket.

Talk to it the way you would in a public place. People nearby can hear you, and the same rules about customer and patient details apply when you speak as when you type. If you are driving, pull over first.

What never goes in

Your setup and your memory are stored by the company that makes the tool. Keep them free of anything you would not want a stranger to read.

- Account numbers, card numbers, Social Security numbers and passwords.
- Health details you would not put on a form you hand to a stranger.
- Names and details of customers, patients, students or clients.
- Private information about your family, friends or coworkers.
- Anything your employer treats as confidential: pay, plans, contracts, internal numbers.

A useful test: if this setup were printed and pinned to the break room wall, would you be comfortable? If not, take the line out.

How your setup grows

The best setups are built over time, one correction at a time. Here is the habit that built mine.

When the tool gets something wrong in the same way twice, add a line to your setup so it does not happen a third time. Keep the line short and specific. A few lines that came from real corrections in my own setup:

- "Write in American spelling," after it kept giving me British spelling for an American audience.
- "Do not use long dashes," after readers told me those dashes made my writing look machine-made.
- "When you change one thing in a document, check the whole document for the same problem," after a fix in one place left the same mistake everywhere else.
- "Avoid sentences built as 'It is not this. It is that,'" after someone pointed out how often this pattern showed up in my drafts.

Every month or two, read your whole setup from top to bottom. Remove lines that no longer apply, combine lines that say the same thing, and move the most important rules to the top. A setup that grows without pruning starts to contradict itself, and the tool gets confused the same way a new employee would with a handbook full of old rules.

What a setup cannot do

A good setup saves time and gets you answers that sound like you. A vague request stays vague, so you still need to say what you want. The tool can still be wrong, so you still check every fact, number and name. Your judgment about what to send, to whom and when also stays yours. The same holds for every tool in this book.

Your fifteen minutes

- Open the AI tool you use most and find its personalization or instructions setting.
- Fill in the six-line template from this chapter and save it.
- Start a new chat and ask, "What do you know about how I want you to work?" Fix anything it got wrong.
- Ask it something you asked last week, and compare the answers.
- Keep a running list called "AI fixes." Each time you correct the tool, capture the correction by voice instead of typing: use your phone's voice typing in a note, or keep one chat in your AI app just for fixes and dictate each one there. Once a week, move the ones that keep coming up into your setup.

Then turn to the chapters on your field and the skills you use most. Every request in them will work better because the tool now knows who is asking.

Behind this chapter

The before-and-after example in this chapter is illustrative. The two answers are typical of what the tools produce with and without a setup, written to show the difference; results vary by tool and by day. The feature names in the table come from each company's help pages and from recent reporting, checked as this chapter was written. The companion page keeps them current.

The habit of adding a line after repeated corrections, and the think-deep mode, come from my own practice. The vendor guidance on what to put in a setup is consistent across companies: OpenAI suggests your role, preferred tone, output formats and guardrails; Microsoft suggests details about yourself and how you want responses formatted; Google

suggests a role, the task, useful background and the output format for each Gem.

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Chapter 3: Asking Well and Staying Safe

How to ask so AI understands, how to check what comes back, and how to keep yourself and the people you serve out of trouble

Marcus runs the night shift at a distribution warehouse with 23 forklift drivers. His company gives supervisors an AI assistant that can read the training records, the shift schedule and the incident log, approved for exactly that work. On a slow Tuesday he asked AI: "Which of my drivers are due for their forklift evaluations in the next 60 days, and how do I fit the evaluations into next month's schedule without leaving a shift short?"

Within a minute the assistant had pulled the records, matched them against the schedule and handed him a plan: five drivers due, a quieter night for each evaluation, and who could cover each shift. Built by hand across three systems, that plan would have taken Marcus most of a night. Before he posted it, he asked one more question, the one this chapter is about: "How did you work out who is due?"

The answer showed its work. The assistant had counted three years from each driver's last evaluation, which matches the federal OSHA rule for powered industrial trucks. One of the five was a driver Marcus would have missed: the same rule requires a new evaluation after an accident or a near miss, and the incident log showed that driver backing into a storage rack in August. The assistant also flagged the one thing it could not

confirm, a driver with no evaluation date in the system. Marcus found the signed form from March in a paper file, entered it, and posted the plan within the hour. He still uses the assistant every shift, and he now asks how it got there before any answer goes into a schedule, a safety record or a decision about a person.

The N in Draw the LINE means Never skip the check. The chapter covers how to ask so AI understands, how to check what comes back, how to stay safe and where the Decision Line sits in your own work.

Six things AI can do for you

Almost everything AI does for a working person today falls into six moves. Once you can see them, you start spotting them all through your week.

- **Read.** Summarize a long document, a thread of emails, a manual or a meeting, and pull out what matters. "Read this 40-page employee handbook and tell me what changed from last year's version, then draft a short note to my team about the changes that affect them."
- **Organize.** Sort, group and schedule, and turn a pile of notes into a plan or a list. "Here are my notes from three customer calls. Turn them into a list of follow-ups with who owns each one, and add my tasks to my calendar as reminders."
- **Draft.** Write the first version of an email, a report, a procedure, a post or a letter. "Draft a short note to tenants about the water shutoff on Tuesday, post it to the building's group chat once I approve it, and remind me Monday night to put up the lobby sign."

- **Analyze.** Work through numbers and patterns and explain them in plain words. "Here is our sales spreadsheet for six months. Which products are slipping, and by how much? Put it in a chart I can paste into Friday's update."
- **Prepare.** Get ready for an interview, an exam, an audit or a hard conversation, including practice. "Play a customer who is angry about a late delivery, and let me practice the call. Afterward, give me a one-page cheat sheet of what worked."
- **Check.** Review your work for gaps, errors and weak spots before it goes out. "Read this proposal as a skeptical buyer would, and tell me the three things you would push back on. Fix what you can and mark what only I can answer."

Asking so AI understands

The toolbox chapter showed that every AI company's guide to asking comes down to about six things. Here they are in more depth, with what each one changes in the answer.

Who you are, and who it is for. "I'm a dental office receptionist writing to a patient who is nervous about a procedure" gets a different answer from "write a message to a patient." Spell out both every time while you are learning.

What you need done. One clear job per request. "Summarize this and draft a reply and make a checklist" usually gets three half-done jobs. Ask for the summary first, then the reply, then the checklist, and the tool does each one properly.

The background. Why you need it and what has happened so far. "The customer has called three times, and we already refunded the shipping" changes the whole tone of a reply.

What to work from. Paste the notes, attach the file or point to the data. An answer built from your material is far more useful, and far easier to check, than one built from the tool's general knowledge.

What the answer should look like. Length, tone, layout and language. "Three sentences I can send by text" or "a one-page checklist I can print" saves you a round of fixing.

How to proceed. For anything bigger than a quick question, I add one line to almost every request: "Ask me your questions first, then tell me your plan in a few lines and wait for my OK." I call this habit Ask first, then go. It keeps you in charge of the work, and it stops the tool from running a long way down the wrong road on a guess.

The same request, asked two ways

Here is a request a property manager might send:

Write a notice about the parking lot.

What comes back is a generic notice about "upcoming parking lot maintenance" with no dates, a polite paragraph about "your patience and understanding," and a closing that thanks residents for their cooperation. The notice is fine, and it answers none of the questions residents will call about.

Now the same request with the six parts:

I manage a 60-unit apartment building. Write a notice for residents, many of whom read English as a second language. The parking lot will be repaved on Thursday and Friday next week, from 7 a.m. to 6 p.m. Residents can park on Elm Street, which the city has approved for those two days. Cars left in the lot will be towed at the owner's cost. Keep it under 120 words, in plain English, with the dates and the street name in bold, and add a Spanish version below it. Ask me if anything is unclear before you write it.

The tool asks one question back: whether residents with accessible parking permits have a separate spot. That question alone saves the property manager a dozen phone calls.

Talk it through

A request is the start of a conversation. The best results come from the second and third turns, when you tell the tool what to change. A few habits help.

- **Use your voice.** On your phone, explaining a messy situation out loud often gives the tool more useful background than you would ever type.
- **Give an example of what good looks like.** Paste one past email, quote or report that you liked and say, "Match this style."
- **Break big jobs into steps.** Outline first, then each section. Plan first, then the details.
- **Push it further.** "Shorter." "Warmer." "Now for a customer who is upset." "What did you leave out?"
- **Let it coach you.** After an answer, ask: "How could I have asked that better?" and "What should I learn next to do this kind of work?" The tool will tell you, and over a few weeks your requests get noticeably better.

Never skip the check

AI tools are wrong more often than their confident voice suggests, and they are wrong in ways that are easy to miss. Knowing the usual mistakes makes them easier to catch.

- **Confident wrong facts.** A rule, a date, a price or a policy that sounds right but is not.
- **Made-up sources.** Citations, quotes, studies and court cases that do not exist. In the 2023 case *Mata v. Avianca*, a federal judge in New York sanctioned lawyers who filed a brief citing court decisions an AI tool had invented. A database kept by the researcher Damien Charlotin had logged more than a thousand U.S. court cases involving AI-invented material by June 2026, about 40% of them involving lawyers.
- **Math done in its head.** Totals, percentages and conversions that are slightly off. Tools that run a small piece of code or a spreadsheet formula to do the math are more reliable, so ask for that.
- **Old information.** Every AI model is trained on information up to a cutoff date, so it may not know about a rule, price or product that changed after that date. Ask when its information is from, or use a research tool that searches the web and shows links.
- **Agreeing with you.** Ask a leading question, and the tool will often lean your way. The working rule from the setup chapter, "If you think I am wrong, tell me," helps here.
- **Missing context.** The tool does not know your company's policy, your state's rule or your customer's history unless you tell it. A tool connected to your records can only work from what is in them, which is why Marcus's assistant flagged the evaluation that lived on paper.

How to check, in practice

Checking means looking hard at the few things that would hurt if they were wrong. You rarely need to redo the whole piece.

- **Ask where it came from, then open the source.** Ask what it used and how it reached the answer, the way Marcus did, then open the record, rule or link it points to and read that part yourself.
- **Check every number, name, date and quote** against the original document, a calculator or the person it is about. These are the details that cause the most damage when they are wrong.
- **Read it as the person receiving it.** A customer, a patient or your manager will read the words differently from you. Read it once in their shoes before you send it.
- **Ask the tool to check itself.** "Go through your answer and list anything you are not sure of, and anything I should verify." It will often flag its own weak spots.
- **Get a second opinion on anything important.** Paste the answer into a different tool and ask what is wrong with it, or ask someone who knows.
- **Match the check to the stakes.** A birthday message needs a glance. A safety rule, a contract, a medication or anything with money attached needs the source.

When the tool makes the same mistake twice, add a line to your setup so it stops. The setup chapter calls this the Twice Rule, and it is how your checking gets easier over time.

Staying safe

The toolbox chapter gave four rules that apply to every tool. Here is what each one means in practice, plus two more.

Keep private information out of public tools

Anything you type into a personal AI account is stored by the company that runs it, and some free tools may use what you share to improve their products. Keep these out of personal accounts:

- Customer, patient, student and client names, details and records.
- Account numbers, card numbers, Social Security numbers and passwords.
- Anything your employer treats as confidential: pay, plans, contracts, prices, internal numbers.
- Private details about family, friends and coworkers.

When you need help with work that involves any of this, swap the details for made-up ones ("Customer A," "a 50-year-old patient," "a \$10,000 invoice"), or use the tool your employer has approved. In health care, patient information is protected by law under HIPAA, and in many jobs, customer data has rules of its own. If you are not sure what your workplace allows, ask before you paste.

Use work tools for work

Many employers now provide an approved AI tool, often a business version of Copilot, Gemini, ChatGPT or Claude, with protections that personal accounts do not have. Use it for work, follow its rules, and keep your personal account for personal things. If your employer has no approved tool and no policy, ask what is allowed before you use AI on anything with your company's name on it.

Get permission for faces, voices and words

Do not use anyone's photo, voice or words in something you make with AI without their permission, and never make

anything that pretends to be a real person. Before you record a call or a meeting to feed into a note-taker, tell everyone on it. Some states, including California, require everyone on a call to agree before it is recorded.

Know the new scams

The same tools that help you also help scammers. With a few seconds of someone's voice from a social media video, a scammer can clone it and call a parent or grandparent in a fake emergency, asking for money. The Federal Trade Commission warns not to trust a voice on its own, to call the person back on a number you know, and to be suspicious of anyone asking for wire transfers, cryptocurrency or gift cards. The FBI suggests agreeing on a secret word or phrase with your family so you can check who is calling. Set one up this week.

Keep your own copies

Tools change, and some disappear. Save anything you make, such as documents, images, videos and your setup, somewhere you control, outside the tool.

Keep people at the center of your own well-being

AI can explain a diagnosis in plain words, help you write a hard letter or talk through a decision late at night. When you are going through something heavy, talk to a person as well: a doctor, a counselor or a friend. In the United States, you can call or text 988 at any hour to reach the Suicide and Crisis Lifeline.

Where the Decision Line sits in your work

The toolbox chapter introduced the Decision Line. On one side is everything AI can do for you: the research, the reading, the first drafts, the numbers and the paperwork. On the other side

are the decisions about money, about health and about a person's mind, and every promise you make to someone. Those stay with you.

Most tasks are easy to place. For the ones that are not, three questions help:

- Does this decide something about someone's money, health or state of mind?
- Does it make a promise to a customer, a patient, a student or a coworker?
- Would I be comfortable putting my name under it as it stands?

If the answer to either of the first two is yes, or the answer to the third is no, the decision is yours. AI can still prepare it, gather the facts, lay out the options and draft the words. You make the call.

Job	AI's side of the line	Your side of the line
Bank teller	Explaining account options in plain words; drafting a follow-up letter	Approving an exception; spotting that a customer is being pressured by someone else
Home health aide	Turning voice notes into the visit log; a reminder list for the family	Noticing the patient is not herself today and calling the nurse
Warehouse supervisor	Drafting the safety talk; building the training schedule	Deciding who drives the forklift; stopping the line when something looks wrong
Teacher	A first draft of the quiz; three versions of a reading for different levels	The grade, the call home, and what a struggling student needs

Financial advisor	Research on funds; meeting notes; a plain-English summary for the client	The recommendation, and the conversation about what the client can live with
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The people who gain the most from AI hand it the legwork and spend the time they get back on their side of the line, with the people they serve. My new mantra for AI is to do more with less. Leave the busy, mundane and long-running tasks to AI, keep the decisions for yourself, and use your time to drive results from what AI has done. AI runs the tasks. You run the results.

Your first week

Your work changes when you use AI on something from your own week. Here is one week, about fifteen minutes a day, on your phone if you like.

- **Day one: set it up.** If you skipped the setup chapter, do your six lines today, and download the app for the assistant you chose.
- **Day two: read.** Give it something long you have been avoiding, such as a policy, a manual or a long thread, and ask for the five things that matter to you.
- **Day three: draft.** Ask for the first version of a message you have to send this week, using the six parts from this chapter.
- **Day four: organize.** Say your to-do list out loud and ask it to sort the list by what is urgent, what is important and what can wait.
- **Day five: check.** Paste something you wrote and ask it to find the gaps. Then check one fact it gave you this week against the original source.

- **Day six: something for home.** A meal plan from what is in your fridge, a budget question, help with your child's homework. You learn the tool faster when you use it for your own life too.
- **Day seven: look back.** Ask the tool, "Based on what I asked you this week, what should I try next, and how could my requests be better?" Write down one thing that worked. That note is the start of your own playbook.

Next comes the E in Draw the LINE, which means Expand your reach. It starts with how your own world is changing, field by field.

Behind this chapter

Marcus is a composite. The forklift rule he checks is real: OSHA's standard for powered industrial trucks requires an evaluation of each operator's performance at least once every three years, with refresher training and a new evaluation after an accident or a near miss. His connected assistant is illustrative; what a workplace assistant can reach depends on how the employer sets it up. The six moves come from the earlier plan for this book. The court case figures come from a June 2026 reflection by the University of North Carolina law library, which cites Damien Charlotin's database. The scam advice comes from the Federal Trade Commission and the FBI. The before-and-after parking notice is written to illustrate, and results vary by tool.

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