🚀 Setup Guide: Sales Call Super-Prep Workforce

Welcome! This guide will get your Sales Call Super-Prep workforce up and running in less than 10 minutes.

This workforce acts as your personal research team. To do its job, it needs two things from you:

1. Access to your portfolio (so it knows your skills).
2. A place to save your files (a Google Drive folder).

Let's get it set up!

Part 1: Connect Your Portfolio (The "Brain") 🧠

This is the most important step. We need to give your "Archivist" agent (Ana) access to your past projects. The easiest way is to upload a simple CSV file to a Relevance AI Knowledge Base.

Step 1.1: Format Your Portfolio into a CSV

We've created a special prompt that instantly turns your messy resume , portfolio or study cases into a clean CSV file.

1. Copy the prompt below.
2. Go to ChatGPT, Claude, or any large language model.
3. Paste the prompt, then paste your resume, project list, or case studies right below it.
4. Run it! The AI will give you a perfect, CSV-formatted text block. Copy this text and save it as CSV.

***Role:** You are a data entry specialist. Your sole job is to convert my unstructured portfolio text into a strict CSV format.*
***Task:** I will paste my resume, project descriptions, or case studies below. You must read all of it and extract every project you can find. For each project, you must populate the following 7 columns:*
1. `project_title`: The name of the project.
*2. `description`: A 1-2 sentence summary of *what the project was*.*

3. `industry`: The client's industry (e.g., "Fintech," "E-commerce," "Healthcare"). If unknown, write "General Business."
4. `client_size`: The size of the client (e.g., "Startup," "SMB," "Enterprise"). If unknown, write "Unknown."
5. `skills_used`: A comma-separated list of key technologies or skills (e.g., "Python, AWS, React, Data Analysis").
*6. `pain_points_addressed`: A comma-separated list of the *business problems* that were solved (e.g., "High server costs, Slow user onboarding, Inefficient data processing").*
7. `testimonials`: Any direct quote from the client. If none, leave this blank.
***Output:** Your final output MUST be *only* the raw CSV-formatted text, starting with the header row. Do not include any other explanations.*

CSV Header (Must be exactly this):
project_title,description,industry,client_size,skills_used,pain_points_addressed,testimonials
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[PASTE YOUR PORTFOLIO/RESUME TEXT HERE]

Step 1.2: Create Your Knowledge Base

1. In your Relevance AI account, go to the Knowledge Base tab in the sidebar.
2. Click "Add Knowledge".
3. Give it a name (like "My Portfolio") and click "Create".
4. Select the "CSV" upload option.
5. Paste the CSV text you copied from Step 1.1 and click "Upload".

Step 1.3: Link Your Knowledge Base to the Agent

1. Open the **"Sales Call Super-Prep"** workforce in the editor.
2. Find the agent named **"Ana the Archivist"** and click on it.
3. Find the **"Knowledge Base"** input field.
4. Select your new **"My Portfolio"** knowledge base from the dropdown menu.
5. Click **"Save"** on the workforce.

Part 2: Connect Google Drive (The "File Cabinet") 🗄️

This tells the workforce where to save the final Sales Briefing

Step 2.1: Create Your Sales Briefing Folder

1. Go to your Google Drive.
2. Create a new folder (e.g., "AI Sales Briefings").
3. Open the folder and look at the URL in your browser. Copy the Folder ID.
    - It's the long string of letters and numbers at the end:
    - https://drive.google.com/drive/folders/[THIS_IS_THE_FOLDER_ID]

Step 2.2: Connect the Google Drive Agent

1. Back in the workforce editor, find the agent named "Google Drive Uploader" and click on it.
2. First, click the "Connect" button to authorize your Google Account.
3. Find the agent's input field named `folder_id`.
4. Paste the Folder ID you copied from Step 2.1 into this field.
5. Click "Save" on the workforce.

You're All Set! 🎉
That's it! The workforce is now fully configured.
To run it, just go to the workforce's "Run" tab and fill in the inputs:

- client_name
- client_website
- job_description
- `decision_maker_name`

Click "Run," and in about 5-10 minutes, a link to a new Google Doc will appear, ready for your call. Good luck!