

# AI ESSENTIALS – STRATEGIC SYSTEMISATION INSTRUCTIONS

Using AI to Design the 4–6 Key Strategic Processes That Run Your Business

## OBJECTIVE:

Document the **4–6 strategic processes** that form the operational backbone of your business using AI, with clarity, precision, and scalability.

## STEP-BY-STEP INSTRUCTIONS:

### Step 1: Load Your Products & Services Spreadsheet

Start by reviewing your **Products & Services Spreadsheet (Columns B, C, D & E)**. This will remind you:

- What you sell
- Who it's for (target persona)
- Key features and benefits
- How it's currently delivered (or could be systemised)

This step will anchor your strategic processes in what actually drives revenue.

### Step 2: Identify Your 4–6 Strategic Processes

These should reflect your business flow from end to end. Think horizontally.

Example:

- Lead Generation
- Sales & Client Onboarding
- Product/Service Delivery
- Client Follow-Up & Results
- Financial Operations (Invoicing, Payments, Reporting)
- Team Management or Retention & Referral

Use your Products & Services Spreadsheet to guide what must be systemised to scale.

### Step 3: Micro-Step Each Process

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Break down each of your 4–6 processes into clear, actionable micro-steps. Think like you’re training a new staff member.

Feeling stuck? Use AI to ask:

***“Break down my process for [Name] into detailed, logical steps.”***

#### **Step 4: Refine with AI (This GPT)**

Paste your draft process into this GPT and request:

- Suggestions for improvements
- Sequence check
- Automation ideas
- Naming and versioning tips

I’ll be your co-pilot. I’ll clean it, question it, and upgrade it.

#### **Step 5: Export to Word/Google Doc**

Once approved, export your processes into Word or Google Docs and file them in your Document Management System.

**Filing Tip:** [Division] – [Process Name] – [v1.0]

#### **VALIDATION:**

Upload your processes here (this GPT) for review and refinement. Multiple drafts encouraged!

#### **AI Prompt Starters**

- **Discover Your Strategic Processes:**  
*“Based on these products/services, what are the 4–6 core strategic processes I need to run and grow my business?”*
- **Micro-Step Expansion:**  
*“Please break down my process for [Name] into a list of micro-steps for staff training and systemisation.”*

- **Final Draft Review:**

*“Here’s my current version. What’s missing? Can you improve it?”*

## **FINAL OUTCOME:**

You’ll finish with:

- 4–6 fully documented strategic processes
- Reviewed and optimised with AI support
- Stored in ready-to-scale format
- A crystal-clear connection between what you *sell* and how you *deliver*

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