

CENTRAL COAST INCUBATOR 

# Before You Hand It to AI

*Identify the Work Actually Worth Automating*

For small business owners ready to save real time — starting with the right question

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WORKSHOP AT A GLANCE

## 60 Minutes. One Practical Outcome.

0:00-0:05	<b>Opening</b>	Why Most Automations Get Abandoned
0:05-0:20	<b>Step 1</b>	Find the Work That's Eating Your Week
0:20-0:35	<b>Step 2</b>	Four Questions Before You Build Anything
0:35-0:52	<b>Step 3</b>	Watch Claude CoWork Handle it in Real Time
0:52-0:58	<b>Step 4</b>	Leave With One Workflow Ready to Run

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OPENING • WHY MOST AUTOMATIONS GET ABANDONED


## Show of hands.

How many of you have set up some kind of automation in the last two years?

*Zapier, a scheduled email, an auto-reply, anything.*

Keep your hand up if that automation is still running exactly as intended today.

*The reason most automations fail isn't the tool. It's that we built before we asked: is this actually the work worth handing off?*

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STEP 1 • FIND THE WORK THAT'S EATING YOUR WEEK (The Friction Audit)

**Take out your phone or a piece of paper.**

**O1** Write down 5 tasks you do repeatedly. Not projects — tasks. Things that happen every week. 2 min

**O2** Next to each task, write roughly how many minutes per week it takes. Don't overthink it. 1 min

**O3** For each task: if it were done wrong — not catastrophically, just wrong enough — what would happen? 1 min

*The tasks that take a lot of time AND where mistakes are recoverable — those are your automation candidates.*

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STEP 2 • FOUR QUESTIONS BEFORE YOU BUILD ANYTHING (The Automation Decision Framework)

**Ask these in order. The order matters.**

**Q1** Does this task have a consistent structure?  
Same inputs, same output type, same basic steps every time? If it changes significantly based on context in your head — not yet.

**Q2** What's the cost of a mistake?  
Low cost = green light. High cost = automate the draft, not the send. You stay in the approval loop.

**Q3** Does it require something only you know?  
If yes, that's a data problem to solve first — not a dead end. Capture that knowledge before you automate.

**Q4** Have you captured the context AI would need?  
A generic AI knows nothing about your business. Your business context file changes everything.

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STEP 2 • THE FOUR BUCKETS

**Every task in your audit belongs in one of these.**

**Ready to Automate**  
Consistent structure + low mistake cost + context captured

**Automate With Review**  
High mistake cost — automate the draft, you approve the send

**Not Yet**  
Context lives only in your head — capture it first, then automate

**Leave It Alone**  
Requires empathy, negotiation, or relationship judgment

*Most business owners trying to automate for the first time belong in the third bucket. That's not failure — that's the starting point.*

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STEP 2 • THE CONTEXT AI NEEDS TO WORK FOR YOU

## Your Business Context File

**What goes in it**

- Who you are and what you sell
- Who your customers are and what they worry about
- Your communication tone and style
- What you never say or promise
- Rules that apply to every task: flag complaints, mark uncertain numbers (VERFY), never invent details

**What it unlocks**

**Write once**  
Every automation you build from this folder inherits your voice, rules, and standards automatically.

**No re-explaining**  
AI doesn't need you to re-describe your business every time. It already knows.

**Your data moat**  
A competitor with the same AI tools still doesn't have your customer history, your patterns, your knowledge. This file is where that advantage lives.

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STEP 3 • WATCH CLAUDE COWORK HANDLE IT IN REAL TIME (Live Demonstration)

## One tool. Plain language. No coding.

Claude CoWork — available in Claude Desktop app (Mac + Windows) on any paid plan starting at \$20/mo. You point it at a folder, describe what you need, and walk away. No integrations. No coding. No separate accounts.

**1**

**The Business Context File**

Show the file. Read the rules section aloud: "Never promise a price or timeline. Flag every complaint for personal review." These constraints are yours — CoWork follows them precisely.

**2**

**The Email Triage Task**

Show the task specification — not a prompt, a specification. Run it live. 30 minutes of inbox scanning becomes a 90-second briefing.

**3**

**The Contrast**

Remove the context file and constraints. Run the same task. The output is generic. Same tool. Same emails. The specification is the difference — not the tool.

If technical issues arise, the screenshots are the backup — the concept lands either way.

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STEP 4 • LEAVE WITH ONE WORKFLOW READY TO RUN (The One Commitment)

## Look back at your list from Step 1.

**60 sec** Identify ONE task. The one that scores best: consistent structure, low cost of mistake, context you can describe.

**90 sec** Write down what the output of automating that task looks like. Not 'save time on emails' — what file gets created? What does it contain? Who reads it? What happens if something in it is wrong?

**30 sec** Write the date you will actually attempt to run that task. Not 'soon.' A date.

That description you just wrote is the beginning of a specification. That is the skill that transfers — regardless of what tool dominates next year.

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*Every automation falls the same way.*

**Not because the tool broke.  
Because someone built a faster  
version of the wrong process.**

- Know what's worth automating before you build anything
- Automate the draft — keep the approval
- The specification is the skill. The tool is the engine.

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For Information

**Central Coast Incubator**

	<b>CCI Website</b> 
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