From Curious to Capable

A Practical AI Playbook for Business Professionals

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What changed in this version

This playbook started as a transcript from a one-on-one conversation: walking through exactly how THAMPICO adopted AI tools, starting with ChatGPT as a Google replacement and progressing through document work, prompting, custom tools, and meeting capture.

This version reorganizes the progression into five stages that reflect how capability actually compounds in practice. Earlier iterations mapped individual techniques to separate stages. Here, related skills are grouped so each stage represents a meaningful shift in how you work, not just a new technique to add.

The platform stack has also expanded. Where earlier versions referenced Claude, ChatGPT, and Granola primarily, this version incorporates Obsidian for offline project memory, Asana as a live system of record, Make.com for automation, and Claude Cowork for writing and syncing markdown files. These are no longer separate tools. They form a connected operating system.

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Introduction

AI tools have been available to most professionals for a couple of years now. Most people have tried one. Fewer have made it a genuine part of how they work. This playbook is for the gap in between.

It is not a technical guide. You do not need to know how these tools work under the hood. What you need is a clear picture of where to start, how to progress, and what the meaningful milestones actually look like.

The five stages here reflect a real progression, one that THAMPICO has lived through from the first question typed into a search-replacement tool to AI-connected workflows that update project records automatically between meetings. You may move through some stages faster than others. The goal is building habits and instincts that hold up under real work conditions.

> **A note on tools**
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> This playbook is tool-agnostic in principle. Examples reference Claude, ChatGPT, Granola, Asana, Obsidian, and Make.com because these are the platforms we use and have tested in real client work. The underlying principles apply regardless of which specific tools you choose.

What to expect

Each stage builds on the one before it. Early stages focus on getting comfortable and building the right mental model. Later stages cover practices that most professionals never reach, not because they are difficult, but because no one showed them the path.

By the end, you should be able to:

- Get consistently high-quality output from any AI platform
- Organize your work so AI always has the context it needs
- Build simple custom tools and automated workflows without knowing how to code
- Capture and synthesize meeting information automatically
- Keep project memory updated across AI, task management, and offline storage without manual effort

The Five Stages

Most professionals enter at Stage 1 and stall somewhere around Stage 2. The jump to Stage 3 is where things start to get interesting, and where real productivity gains begin to compound. Stages 4 and 5 are where AI becomes part of the operating rhythm rather than a tool you pick up occasionally.

#	Focus	What changes	You are here when...
1	Foundational Assistance	Search and documents	You replace search engines with synthesized answers and use AI to draft and edit documents
2	Command AI with Master Prompting	Basic, advanced, and self-prompting	You move from basic tasks to self-prompting, where you ask AI to write its own instructions for high-stakes work
3	Establish Persistent Context and Memory	Projects, memory, connectors	AI always has the right background before you type anything, using project folders and live data connectors
4	Build Custom No-Code Tools	Skills and automations	You create reusable skills and simple scripts to handle repeatable tasks without needing a developer
5	Launch the Circular Workflow	Meetings, memory, tasks in a closed loop	Meetings, tasks, and project memory update each other automatically, with AI closing the loop between sessions

Stages 3, 4, and 5 represent the connected operating model. Earlier stages build toward them.

1 Foundational Assistance: Search and Documents

Replace search engines. Draft and edit documents faster.

What changes at this stage

The difference is that the answer is synthesized for you rather than pointing you toward a source you still have to read and interpret. You get the answer, not ten links that might contain the answer.

Good uses at Stage 1:

- Quick definitions and explanations of unfamiliar terms
- Comparing two options (what is the difference between X and Y)
- Plain-English summaries of complex topics
- Research questions that would normally require reading multiple sources

Common mistake

Typing short keyword fragments, the way you would into a search engine. AI works better with full sentences and real context. Write the way you would ask a knowledgeable colleague.

Tip

Use it for the next thing you would have Googled. Notice the difference in how the answer comes back.

Document Work

Once you are comfortable with Q&A, the next step is working with actual documents. Paste in text, upload files, or give it a draft you have already written. Ask it to summarize, edit, reformat, or analyze. This is where AI starts saving real time.

What you can do

- Summarize long documents, reports, or articles in seconds
- Draft emails, memos, and updates from bullet points you provide
- Improve and polish writing you have already drafted
- Extract key points, action items, or decisions from meeting notes
- Reformat content from one structure to another

> **Real example**
>
> Upload a 40-page RFP and ask: "What are the five most important evaluation criteria? What is the submission deadline? Summarize the scope of work in plain language." You get structured answers in under a minute.

2 Command AI with Master Prompting

Move from basic asks to self-prompting for high-stakes work.

The quality of what AI gives you is directly tied to the quality of what you ask. This is called prompting, and getting better at it is the single highest-leverage skill you can develop at this stage.

The basic prompt upgrade

Most people start with something like: "Write me a proposal for a bridge construction project." That works, but the output is generic. A better prompt gives it three things:

Element	What it does	Example
Role	Tells AI what perspective to take	You are a senior project manager with infrastructure experience
Task + context	Specifies what to produce and why	Write a two-page proposal for a city bridge retrofit covering drainage and structural assessment
Format	Defines the structure of the output	Use section headers: Executive Summary, Scope, Timeline, Deliverables

Advanced Prompting

Advanced prompting is the same skill taken further. The more specific you are about role, constraints, audience, tone, and output format, the more useful the result. At this stage you stop editing bad output and start refining good output.

What a fully specified prompt looks like

Example prompt

You are a senior communications consultant. Your task is to draft an internal memo announcing a new project approval process to a team of 30 project managers. The tone should be clear and direct, not corporate. The memo should be under 400 words, use short paragraphs, and end with a bulleted list of three next steps. Do not use the words "leverage," "synergy," or "robust."

This prompt specifies role, audience, tone, length, structure, and explicit exclusions. Each constraint removes a degree of freedom that would otherwise produce generic output.

Other useful constraints to include:

- Audience: who will read this and what they already know
- Length: word count, number of bullets, number of pages
- Tone: formal, direct, conversational, technical
- Exclusions: words, phrases, or approaches to avoid
- Format: headers, tables, numbered steps, plain prose

Tip

Write your prompt, then read it as if you were the AI. What is ambiguous? Fix that before sending.

Self-Prompting

Instead of spending time crafting the perfect prompt yourself, describe the task in plain language and ask the AI to generate its own prompt, and to ask you for whatever information it needs to do the job well. This is the most underused technique in AI work.

How to do it

Start with a simple description of what you want to accomplish. Then add one instruction:

> **The instruction**
>
> Based on what I just described, draft the best possible prompt for this task. Then ask me for any additional information you need before you begin.

The AI will generate a prompt that is almost certainly more thorough and better structured than what you would have written yourself. It will also identify gaps in the context you provided and ask targeted questions to fill them in.

Why this works

AI systems have processed an enormous amount of information about how to structure tasks and what good prompts look like. They are, in a straightforward sense, better at prompt engineering than most humans. Using that capability to write your prompt, rather than just execute it, is a simple but significant upgrade.

> **Tip**
>
> Use this for any high-stakes deliverable: proposals, executive summaries, strategic memos.

3 Establish Persistent Context and Memory

Use project folders and connectors so AI knows your work before you start.

Every AI conversation starts fresh. By default, it does not know your clients, your projects, your preferences, or your history. Context management is the practice of solving this systematically, so you are not re-explaining the same background every time.

The Projects approach

Claude and ChatGPT both support a Projects feature. You create a project for each client, engagement, or work area, upload the relevant documents, and all chats within that project reference that material automatically.

What to load into a project:

- Project or engagement overview
- Key documents: plans, scopes, org charts, prior deliverables
- Client background and context
- Decisions made and directions agreed on
- Your preferences for tone, format, and structure

Important note

Chats within a project share the same documents but do not share each other's conversation history. Keep your project files updated with any major decisions so every chat stays current.

Connectors and live data

In addition to static documents, Claude now supports connectors that link directly to external platforms: Google Calendar, Gmail, Granola, Slack, Asana, Microsoft 365, and others. These connectors mean that instead of uploading a snapshot of your data, AI can query the live version.

Practical examples:

- Pull open Asana tasks into a conversation without copy-pasting them
- Reference a recent Granola meeting transcript directly from the context window
- Check calendar availability when drafting a project timeline
- Search Slack history for a prior decision without leaving the AI interface

What this changes

With connectors active, the AI starts from current data rather than from whatever you remembered to upload. Context management becomes less about manual file maintenance and more about configuring the right connections.

4 Build Custom No-Code Tools

Create reusable skills and automations without writing code.

At Stage 4, you are asking AI to write code on your behalf, not to learn coding, but to build simple functional tools that solve real problems in your work. You also start building skills: structured instructions that tell AI exactly how to handle a specific repeatable task.

What kinds of tools are realistic

- Dashboard that reads a spreadsheet and visualizes workload or project status
- Form that collects structured input and generates a formatted output
- Script that extracts and summarizes content from a video or document
- Tracker that organizes project data and highlights what needs attention
- Template generator that produces customized documents from standard inputs

What skills add

A skill is a reusable instruction set stored in a project or workspace. Instead of re-explaining how to run a process each time, you write the logic once and reference it in any conversation. THAMPICO has built skills for meeting processing, project memory management, Asana task sync, executive report generation, and writing quality checks.

The value of skills is consistency. Any conversation that invokes the meeting processor skill follows the same extraction logic, produces the same output format, and proposes the same types of Asana updates. The output improves as the skill improves, without any change to how the AI is prompted in each conversation.

> **What this replaces**
>
> A developer would charge thousands of dollars and weeks of calendar time to build what you can now produce in an afternoon. The tools are simpler, but for internal use cases they are often exactly what is needed.

5 Launch the Circular Workflow

Close the loop between meetings, tasks, and project memory.

Stage 5 is where the individual capabilities from earlier stages combine into a connected operating pattern. A circular workflow is a recurring coordination cycle in which each meeting produces a structured project record, and that record becomes the starting point for the next meeting. The loop runs automatically, with AI handling the conversion steps.

The problem it solves

Most recurring coordination workflows fail because the meeting and the project record operate as separate systems. The team talks through the work in one place, but the durable record lives somewhere else: in Asana, email, a shared folder, or a manager's notes. The gap between those systems creates friction.

The circular workflow closes that gap. After a meeting, AI processes the transcript, extracts decisions and action items, pushes updates to Asana, and refreshes the project record. Before the next meeting, AI pulls the current state of that record to generate the agenda. The team stops reconstructing status from memory and starts each conversation from the latest known state.

How the loop works

Step	Input	Action	Output	Value created
1. Start	Latest project record	Pull current state into the agenda	Agenda grounded in facts	Team starts from data, not memory
2. Capture	Meeting discussion	Record what happens in real time	Raw transcript or notes	No context gets dropped
3. Process	Raw transcript	AI extracts decisions, tasks, risks, open items	Structured summary	Signal separated from noise
4. Update	Structured summary	Push tasks, owners, due dates, decisions to Asana	Updated project record	Status becomes a byproduct of work
5. Deploy	Updated record	Generate next agenda, briefing, or escalation	Next meeting package	Next cycle starts from current state

The loop converts each meeting into the operating input for the next cycle. AI handles the conversion steps. Human review validates decisions and escalations.

The role of Obsidian

Obsidian serves as the offline project memory layer. Four markdown files per engagement track the current state of the work: a README with background and scope, a STATUS file with live workstream status, a DECISIONS log, and a PROGRESS log. Claude Cowork reads and writes these files directly, keeping them current after each meeting cycle.

Because these files are local markdown, they are version-controlled, readable without any platform dependency, and available to AI in any future conversation. A team member who missed a meeting can open Claude, attach the project files, and ask for a full briefing in under a minute.

> **Concentric workflows**
>
> At the team level, multiple loops run at different layers. Working-session loops feed project loops. Project loops feed management loops. The result is a layered operating system where the same captured work surfaces at the right level of detail for each audience, without anyone recreating the same information in separate formats.

Implementation approach

Start with one recurring meeting where status reconstruction is painful and visible. Define the system of record before designing the loop: Asana, a PMIS, or a comparable task manager must be the durable record. Standardize what gets extracted: decisions, action items, owners, due dates, risks, dependencies, and open questions. Generate the next agenda from the updated record, not from a blank template.

Add outer layers (team and management reporting) only after the meeting loop works reliably. Management visibility should be a byproduct of the coordination work, not a separate administrative burden.

> **Tip**
>
> Measure the before and after in concrete terms: meeting preparation time, time spent reconstructing last week's status, number of dropped follow-ups, and how long it takes to brief a new team member.

Bonus: Capturing Meetings Automatically

Regardless of which stage you are at, meeting transcription deserves special mention. Granola runs in the background during any call, transcribes in real time, and exports transcripts that can be fed directly into AI platforms for processing.

- No setup required per meeting; it detects calls automatically
- Works across platforms: Zoom, Teams, Google Meet, and in-person calls
- Exports directly into Claude or ChatGPT for structured note generation

> **Workflow tip**
>
> When a meeting ends, the Granola transcript feeds into Claude's meeting processor skill. Claude extracts decisions, action items, open questions, and risks. It then proposes Asana task updates for your review. A one-hour meeting becomes a clean project update in under two minutes.

A note on consent

Recording laws vary by jurisdiction. In many U.S. states, one-party consent applies to transcription for personal note-taking, but two-party or all-party consent laws exist in others. Know the rules for your state or context before relying on this in client or external meetings.

Recommended Tools

The following tools form the connected stack reflected in this playbook. Each plays a specific role. They are more useful together than separately.

Tool	Best for	Role in workflow	Cost
Claude (Pro)	Writing, analysis, coding, project memory, skills	Primary AI platform for THAMPICO workflows	$20/mo
ChatGPT (Plus)	General use, research, versatile tasks	Secondary platform; strong for structured data	$20/mo
Granola	Automated meeting transcription	Capture layer: feeds raw transcript into Claude	Free tier
Asana	Task and project tracking	System of record; receives AI-pushed updates	Free / paid
Obsidian	Offline markdown project memory	Persistent memory store; updated by Claude Cowork	Free
Make.com	Workflow automation	Connects platforms and automates data flows	Free / paid
Claude Cowork	File and workspace management	Writes and syncs markdown memory files	Included

Quick Reference

Use this table to find the right entry point based on where you are today.

If you...	Your first action	Start here
Have never used AI	Ask Claude or ChatGPT something you would normally Google	Stage 1
Use it for Q&A only	Upload a document and ask it to summarize and extract action items	Stage 2
Already use it for documents	Rewrite your next prompt with role, task, and format specified	Stage 2
Write structured prompts	Ask AI to write its own prompt for your next big deliverable	Stage 2
Use AI daily for work	Create a Project for your most active client or engagement	Stage 3
Context management in place	Build a skill or connect Granola for automatic meeting processing	Stage 4
Skills and tools in use	Set up a circular workflow around one recurring meeting	Stage 5

The Real Shift

The professionals getting the most out of AI are not necessarily the most technical. They are the ones who stopped treating it as a novelty and started treating it as a working part of how they operate.

The gap between occasional user and genuine capability is mostly a matter of habit, a few techniques, and the willingness to push past Stage 1. Most people stop there. The ones who push further find that each stage compounds: better prompts produce better output, better context produces better prompts, better tools reduce the repetitive work, and a closed loop means nothing falls through the gap between meetings.

> **The one thing to try today**
>
> Open Claude or ChatGPT. Describe the next deliverable you need to produce. Then type: "Based on what I just described, write the best prompt for this task and ask me for any information you need." See what comes back.

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