



FREE SAMPLER

AI Assistant Toolkit for Freelancers & Small Businesses

5 sample prompts + a workflow preview

Works with any AI chat assistant and most no-code automation tools



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Everything in the Full Toolkit

Prompts marked **(in this sampler)** are included here. The rest are in the full toolkit.

Email Handling

- #01 Inbox Triage in One Pass **(in this sampler)**
- #02 Summarize a Long Thread
- #03 Reply in My Voice
- #04 Polite "No" Without Burning the Bridge
- #05 Follow-Up When Nobody Replied
- #06 Turn an Email Into a To-Do List

Client Communication

- #07 New-Client Welcome Email
- #08 Weekly Project Status Update
- #09 Handling Scope Creep
- #10 Delivering Bad News (Delay or Mistake)
- #11 Asking for Feedback or a Review
- #12 Client Call Prep Sheet

Proposals & Quotes

- #13 Discovery Questions Before Quoting
- #14 One-Page Proposal Draft **(in this sampler)**
- #15 Three-Tier Pricing Options
- #16 Explain My Price Without Discounting
- #17 Quote Follow-Up Sequence
- #18 Statement of Work Checklist

Research

- #19 Prospect Background Brief
- #20 Competitor Comparison Table
- #21 Research Brief From My Sources
- #22 Choose Between Two Tools
- #23 Explain It Like I'm New

Content Planning & Scheduling

- #24 Monthly Content Calendar **(in this sampler)**
- #25 One Idea, Ten Posts
- #26 Blog Post Outline
- #27 Newsletter Draft
- #28 Batch Posting Schedule
- #29 Content From Client Questions

Customer-Service Replies

- #30 Reply to a Frustrated Customer **(in this sampler)**
- #31 Build My FAQ Answers
- #32 Saved Replies Library
- #33 Refund Request Response

- #34 Turn a Complaint Into an Improvement
- #35 Tone Check Before Sending

Invoicing & Admin

- #36 Friendly Payment Reminder (3 Stages)
- #37 Invoice Line-Item Descriptions
- #38 Simple Business Policies
- #39 Expense Categorizer
- #40 Standard Operating Procedure Writer

Marketing & Social

- #41 Clarify My Offer
- #42 Social Post From a Real Win
- #43 Short-Video Script
- #44 Cold Outreach That Feels Personal
- #45 Lead Magnet Idea Generator

Productivity & Planning

- #46 Weekly Plan From a Brain Dump ([in this sampler](#))
- #47 Daily Top-Three
- #48 Meeting Notes to Action Items
- #49 Decision Helper
- #50 Monthly Review

Automation workflows

- Workflow 01: Inbox Triage & Auto-Draft Replies ([preview in this sampler](#))
- Workflow 02: Research Brief Pipeline
- Workflow 03: Weekly Content Calendar Generator
- Workflow 04: Customer FAQ Auto-Reply (Draft Mode)
- Workflow 05: Lead Follow-Up Sequence
- Workflow 06: Meeting Notes to Tasks
- Workflow 07: Invoice Reminder Assistant

How to Use This Toolkit

Every prompt works in any modern AI chat assistant (for example ChatGPT, Claude, or Gemini). No plugins or special settings needed. The workflows show how to run the same prompts automatically with a no-code automation tool, always ending in a draft you review.

Fill in the [BRACKETS]

Anything in **[CORAL CAPS]** is a placeholder. Replace the brackets and the words inside them with your real details before you run the prompt, for example **[CLIENT NAME]** becomes *Maple & Co.* and **[WORD COUNT]** becomes *120*. If a bracket does not apply, delete that line.

- 1 **Pick a prompt** for the task in front of you.
- 2 **Copy it** into a text editor and **fill every [BRACKET]** with real details.
- 3 **Paste it into your AI assistant.** Start a fresh chat for each new task so old context does not leak in.
- 4 **Review and refine.** Check every fact, then ask for changes: "shorter", "warmer", "more like my voice".

Tips for better results

- **Teach it your voice once.** Paste 2-3 things you wrote and say: "Study my tone and use it for everything in this chat."
- **Specific in, specific out.** Real names, numbers, and deadlines beat adjectives.
- **Ask for options.** Add "Give me 3 versions" and combine the best lines.
- **Iterate.** "Cut by 30%", "make the opening stronger", and "simpler words" all work as follow-ups.
- **Save your winners.** Keep filled-in versions in a notes file to reuse next time.

Use AI responsibly

- **You are the sender.** AI drafts; you approve. Read every message before it goes to a client or customer.
- **Do not let AI invent facts.** Prices, dates, policies, numbers, and results must come from you. Several prompts say so explicitly - keep those lines.
- **Protect privacy.** Do not paste passwords, ID or card numbers, health details, or confidential client data into AI tools. Check your provider's data settings.
- **Follow the rules where you work** on marketing email, consent, recording calls, refunds, and late fees.

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PART 1 • SCENARIO 01

Email Handling

Get through your inbox faster: summarize long threads, sort what matters, and draft clear replies in your own voice.

#01 Inbox Triage in One Pass

You are my inbox assistant. Below are **[NUMBER]** emails I received today, pasted with sender, subject, and body.

Sort each one into: (1) Reply today, (2) Reply this week, (3) FYI only, (4) Can ignore or unsubscribe.

For every email give: category, a one-line summary, and the single next action I should take.

Finish with a short list of anything that has a deadline, with the date.

Emails:

[PASTE EMAILS]

EXAMPLE OUTPUT (ILLUSTRATIVE, NAMES ARE FICTIONAL)

1) Reply today - "Invoice question" from Dana (client): asks why line 3 differs from the quote. Action: confirm the revised scope and resend invoice.

2) FYI only - Newsletter from co-working space: holiday hours. Action: none.

Deadlines: Contract renewal from Lee Studio - sign by Friday the 14th.

PART 1 • SCENARIO 02

Proposals & Quotes

Win more of the right work: clear proposals, confident pricing explanations, and fast quote follow-ups.

#14 One-Page Proposal Draft

Write a one-page proposal for **[CLIENT NAME]**.

Their problem: **[PROBLEM]**. My solution: **[APPROACH]**. Deliverables: **[LIST]**. Timeline: **[TIMELINE]**.

Investment: **[PRICE + PAYMENT TERMS]**.

Sections: The Goal, What I'll Deliver, How We'll Work, Timeline, Investment, Next Steps.

Use plain language, no jargon, and do not invent results or statistics.

EXAMPLE OUTPUT (ILLUSTRATIVE, NAMES ARE FICTIONAL)

The Goal

Give Maple & Co. a booking page that turns more visitors into scheduled consultations.

What I'll Deliver

- A redesigned booking page (desktop and mobile)
- Two rounds of revisions
- A short handover video

Next Steps

Reply "approved" and I'll send the agreement and first invoice; we can start Monday.

PART 1 • SCENARIO 03

Content Planning & Scheduling

Plan a month of content in an afternoon, then turn one idea into many posts.

#24 Monthly Content Calendar

Create a **[NUMBER]**-week content calendar for **[BUSINESS TYPE]** targeting **[AUDIENCE]**.
Platforms: **[PLATFORMS]**. Posting frequency: **[POSTS PER WEEK]**.
Content pillars: **[3-4 THEMES]**. Return a table: week, day, platform, pillar, post idea, format (text, carousel, short video, etc.), call to action.
Balance teaching, behind-the-scenes, proof of work (only real examples), and offers.

EXAMPLE OUTPUT (ILLUSTRATIVE, NAMES ARE FICTIONAL)

Week 1 | Tue | LinkedIn | Process | "What happens in the first 48 hours after you hire a bookkeeper" | Text post | CTA: Comment "checklist" for the onboarding list

Week 1 | Thu | Instagram | Behind the scenes | My month-end close routine in 5 steps | Carousel | CTA: Save for later

PART 1 • SCENARIO 04

Customer-Service Replies

Answer customers quickly, kindly, and consistently - including the difficult ones.

#30 Reply to a Frustrated Customer

Write a reply to the customer message below.

Facts: **[WHAT ACTUALLY HAPPENED]**. What I can offer: **[REFUND / REPLACEMENT / CREDIT / NEXT STEP]**.

Structure: acknowledge their frustration in one sentence, own what went wrong, state the fix and timeline, close with a direct way to reach me.

Do not promise anything beyond what I listed.

Customer message:

[PASTE MESSAGE]

EXAMPLE OUTPUT (ILLUSTRATIVE, NAMES ARE FICTIONAL)

*Hi Jordan, I'm sorry - waiting nine days for an order that should take three is frustrating, and that's on us. Your package was held at our warehouse due to a labeling error. I've re-sent it by express today (tracking: **[TRACKING]**) and refunded your shipping. If anything else looks off when it arrives, reply here and I'll sort it personally. - Priya*

PART 1 • SCENARIO 05

Productivity & Planning

Plan your week, protect your focus, and make decisions with less second-guessing.

#46 Weekly Plan From a Brain Dump

Here is everything on my mind this week: **[BRAIN DUMP]**.

My fixed commitments: **[MEETINGS / DEADLINES]**. Available focus hours per day: **[HOURS]**.

Sort tasks into Must / Should / Could, estimate time for each, and build a day-by-day plan that leaves 20% buffer.

Suggest what to delegate, automate, or drop.

EXAMPLE OUTPUT (ILLUSTRATIVE, NAMES ARE FICTIONAL)

Must (Mon-Tue): Finish Lee Studio logo files (3h); send May invoices (45m).

Should (Wed-Thu): Draft newsletter (1.5h); update portfolio page (2h).

Could: Reorganize file storage.

Drop or delegate: Manual social scheduling - batch it in one 90-minute block on Friday.

PART 2

Copy-Paste Automation Workflows

Each workflow connects a trigger (a new email, a form entry, a schedule) to an AI step that uses one of the prompts below, then saves the result somewhere you will see it. The steps are tool-agnostic: any automation tool that has a trigger, an AI step, a text parser, and a "create draft / create row / create task" action can run them. Each one also shows an example chain in a popular no-code tool.

Before you automate

- **Drafts, not sends.** Every workflow ends in a draft, a card, or a row for review. A human approves anything a client or customer will read.
- **Start small.** Run a workflow on a narrow filter (one label, one form) for a week, then widen it.
- **Fixed output formats.** The prompts ask for labeled sections separated by ###, so your parser can split them reliably. Do not remove those lines.
- **Watch the costs.** AI steps and automation runs may be billed per use. Add filters so the workflow only runs when it should.
- **Keep sensitive data out.** Filter out messages with payment, identity, or health details, and respect client confidentiality terms.
- **Test with fake data first.** Send yourself sample emails or form entries before connecting real accounts.

Common building blocks

Trigger	Starts the workflow: new email, new form entry, new row, new file, or a schedule.
Filter	Stops runs you do not want (newsletters, no-reply senders, already-processed items).
AI step	Sends your filled-in prompt to an AI model and returns the text.
Parser / formatter	Splits the AI output at "###" into named fields.
Router / paths	Sends items down different branches based on a field, e.g. CATEGORY.
Action	Creates the draft, row, card, task, or notification.

WORKFLOW 01 • PREVIEW

Inbox Triage & Auto-Draft Replies

GOAL	Every new client email gets a category, a one-line summary, and a ready-to-edit draft reply - so you open your inbox to decisions, not blank pages.
TRIGGER	A new email arrives in your inbox (optionally only from known clients or with no label yet).
YOU NEED	Email account + an AI step + your automation tool (e.g. Zapier, Make, or n8n)
SETUP TIME	About 30-45 minutes to set up

Step-by-step setup (first steps)

- 1 Create a trigger for **new email received**. Add a filter so newsletters, receipts, and automated senders are skipped (e.g. sender does not contain "noreply").
- 2 Add an **AI step** and paste **Prompt A**. Map the email's sender, subject, and body text into the brackets.

In the full toolkit: all 7 setup steps, the exact prompts for this workflow, an example chain in a popular no-code tool, and tips & safety notes.

LIKED THESE?

Get the Full Toolkit

This sampler has 5 of the 50 prompts and a preview of 1 of the 7 workflows. The full toolkit adds:

- **45 more prompts** across 9 scenarios: email, clients, proposals & quotes, research, content, customer service, invoicing & admin, marketing, and planning
- **All 7 complete workflows** with exact prompts, example chains, and safety tips: inbox triage, research brief pipeline, weekly content calendar, FAQ auto-reply (draft mode), lead follow-up, meeting notes to tasks, and invoice reminders
- **Example outputs** so you can see what good looks like
- **A quick-reference page** of follow-up prompts to refine any draft
- A polished PDF you can keep, search, and print

Get it at radixum.com

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