



The Playbook

10 AI Workflows Every Female Entrepreneur Should Steal

A practical, premium operating system for founders who are done dabbling with AI and ready to install workflows that protect time, sharpen decisions, and move the business forward.

Curated by **Cheryl L. James**
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How to use this guide: Read it once. Choose one workflow. Install it this week. Then return next week for the next one.

Let's run it smarter.

AI

The Workflow Portfolio

Each workflow is designed to remove a specific form of operational drag. The goal is not to install everything at once; the goal is to build a more intelligent operating rhythm one workflow at a time.

Workflow	Strategic Function	Setup	Impact
01 The Pre-Meeting Brief AI Agent	Generates a one-page brief before every client meeting so you walk in prepared instead of scrambling.	20 min	3–5 hrs
02 The Custom GPT in Your Voice	Trains an AI assistant on your actual writing samples so outputs sound like you, not generic AI.	45–60 min	Multiplier
03 The Inbox Triage Assistant	Sorts incoming emails into reply-now, reply-later, delegate, and archive buckets.	20 min	5–7 hrs
04 The Weekly Client Recap Generator	Produces a weekly client recap with what happened, what is outstanding, and what comes next.	15 min	2–4 hrs
05 The Proposal Drafting Workflow	Drafts a complete client proposal from a five-minute briefing.	45 min	2–4 hrs
06 The Decision Support AI	Pressure-tests complex business decisions without replacing your judgment.	10 min	Quality lift
07 The Content Repurposing Engine	Turns one strong long-form piece into ten pieces of channel-ready content.	20 min	4–6 hrs
08 The Daily Founder Stand-Up	Creates a five-minute morning structure for priorities, avoidance, and decisions.	10 min	Focus lift
09 The Follow-Up Sequence Generator	Writes follow-up sequences so warm leads do not slip through the cracks.	20 min	3–5 hrs
10 The Meeting Notes + Action Items AI	Turns transcripts or rough notes into summaries, decisions, action items, and follow-up messages.	30 min	5–10 hrs

A Note From Cheryl

If you've tried ChatGPT and felt like AI doesn't quite fit your business — this Playbook is for you.

I'm Cheryl L. James. I built CL James Consulting after 27 years of Fortune 100 operations leadership. I'm Google AI certified. And I write Her AI Edit — the weekly newsletter for female entrepreneurs done dabbling with AI.

This Playbook is 10 of the AI workflows I install most often for the female entrepreneurs I work with. Each one is implementation-ready. Each one solves a real, specific problem. Each one was built around the way female founders actually work — not the way tech bros assume we should.

Here's how to use this Playbook:

Read it once cover-to-cover (30 minutes). Don't skip to the workflows yet.

Pick ONE workflow to install this week. Just one.

Install it. Use it for 7 days.

Then pick the next one.

If you try to install all ten at once, you'll install none. If you install one a week, in 10 weeks you'll have a custom AI operating system running in your business. That's how it actually works.

Let's run it smarter.

— Cheryl

Before You Start

What you'll need

A ChatGPT Plus account (\$20/month) OR a Claude Pro account (\$20/month). Either works for every workflow in this Playbook.

Your existing tools (email, calendar, your CRM, Google Docs or Microsoft 365). No new subscriptions required.

30-60 minutes of focused time to install each workflow.

Honesty about what your business actually needs. Not what someone told you to want.

A note on "voice"

Every workflow in this Playbook can be customized to sound like you. The way to do that is to give the AI samples of your actual writing — emails you've sent, proposals you've written, posts you've published. The more you give it, the more it sounds like you.

Don't skip the voice-training step. AI that sounds robotic is worse than no AI.

A note on what AI is for

AI is not here to replace your judgment. Your judgment is what your clients pay for. AI is here to take over the drafting, the triage, the recap, the formatting, the synthesis, and the repetitive — so you can focus on what only you can do.

Build with that frame and AI becomes a force multiplier. Build with any other frame and it becomes a frustration.

WORKFLOW 01

The Pre-Meeting Brief AI Agent

What it does

Generates a one-page brief before every client meeting — pulling context from your last conversation, their current status, and what's likely to come up — so you walk in prepared instead of scrambling.

Why it matters for female entrepreneurs

Most female founders I work with do 8-15 client meetings a week and spend 15-20 minutes prepping for each one. That's 2-5 hours per week of pure prep. The Pre-Meeting Brief Agent cuts that to 3-5 minutes per meeting — without sacrificing the depth of your preparation. The output is often better than what you'd write yourself under time pressure.

Build steps

1. Open ChatGPT or Claude. Create a new Custom GPT (ChatGPT) or Project (Claude). Name it: "Pre-Meeting Brief Generator."
2. In the system instructions, paste the following prompt:

```
You are my pre-meeting brief generator. Before any client meeting, ask me for: 1) the client's name and business, 2) the date of our last interaction and what was discussed, 3) the topic and purpose of today's meeting. Then produce a one-page brief that includes: CONTEXT (what's happened so far in 3 sentences), THREE DISCUSSION POINTS (the most likely things to cover), TWO QUESTIONS TO ASK (that demonstrate I've been listening), and ONE OUTCOME TO PUSH FOR (a clear ask or next step). Keep the tone professional and warm. Output in clean formatted text I can copy into Notion or print.
```

3. Test it with a meeting you have this week. Refine the prompt if the output isn't quite right.
4. Use it before your next 3 client meetings. By meeting 4, you'll never go back.

Tool needed

ChatGPT Plus or Claude Pro (\$20/month)

Time to set up

20 minutes

Time saved per week

3-5 hours (assuming 10 meetings/week)

WORKFLOW 02

The Custom GPT in Your Voice

What it does

Trains an AI assistant on your actual writing samples so it produces emails, posts, proposals, and content in your real voice — not generic ChatGPT-speak.

Why it matters for female entrepreneurs

The number one complaint I hear from female founders is "AI doesn't sound like me." That's true if you're using AI out of the box. It stops being true the moment you train it on your real writing. This is the foundational workflow — once you have a Custom GPT trained on your voice, every other workflow in this Playbook becomes 10x better.

Build steps

1. Pull together 10-15 samples of your actual writing. Mix of: emails you've sent (especially to clients), social posts, blog posts, proposals, any voice memos transcribed. The more variety, the better. Aim for 5,000+ words of total content.
2. Open ChatGPT (Plus required for this) and click "Explore GPTs" → "Create." Name it: "[Your Name]'s Voice."
3. In the Instructions field, paste:

```
You are my writing assistant trained on my actual voice. Your job is to write in the way I write - using my sentence patterns, my word choices, my rhythm, my point of view. When I ask you to draft something, produce a draft that sounds like me, not like a generic AI. Match my level of warmth, directness, and detail. Reference my style examples (uploaded) before writing anything.
```

4. Click "Upload Files" and upload your 10-15 writing samples as a single PDF or as separate text files.
5. Test by asking it to draft something simple in your voice. Compare to how you'd actually write it. Adjust the instructions if needed.
6. Use this Custom GPT as the foundation for every other workflow in this Playbook.

Tool needed

ChatGPT Plus (\$20/month) — Custom GPTs require Plus subscription

Time to set up

45-60 minutes (most of this is gathering writing samples)

Time saved per week

Variable — but it's the multiplier on every other workflow. Without this, AI sounds robotic. With it, you can actually delegate writing tasks.

WORKFLOW 03

The Inbox Triage Assistant

What it does

Sorts incoming emails into 4 buckets (reply now, reply later, delegate, archive) and drafts responses for the "reply now" emails in your voice — so you walk into your inbox with a plan, not a panic.

Why it matters for female entrepreneurs

If your inbox is open after 9 PM, this workflow alone will give you your evenings back. Most female founders spend 1-2 hours a day on email. The Inbox Triage Assistant doesn't eliminate that time entirely — but it cuts it by 50-70% by handling the cognitive overhead of "what should I do with this?" before you ever read the email.

Build steps

1. Open your Custom GPT (Workflow #2) or a new GPT/Project.
2. Paste this system prompt:

```
You are my inbox triage assistant. When I paste in an email I've received, do the following: 1) Categorize it into one of four buckets: REPLY NOW (urgent, requires me personally, important client/opportunity), REPLY LATER (important but not urgent, batch with similar), DELEGATE (someone else on my team or contractor should handle), or ARCHIVE (FYI, newsletter, no action needed). 2) For anything in REPLY NOW, draft a response in my voice that I can edit and send. Keep the draft conversational, warm, and direct. 3) For anything in DELEGATE, draft the forwarding note ("hey [name], can you handle this - needs a response by [day]?"). 4) Output in this format: CATEGORY, RECOMMENDED ACTION, DRAFT RESPONSE (if applicable).
```

3. Each morning, batch-process your inbox: copy 5-10 emails, paste them in, let the AI triage.
4. Reply to the REPLY NOW drafts (after editing). Batch the REPLY LATER for an afternoon block. Forward the DELEGATE ones. Archive the rest.

Tool needed

ChatGPT Plus or Claude Pro

Time to set up

20 minutes

Time saved per week

5-7 hours

WORKFLOW 04

The Weekly Client Recap Generator

What it does

Produces a one-page recap for every active client at the end of each week: what happened, what's outstanding, what needs to happen next week, and a draft of the follow-up message — so you walk into Monday with clarity instead of confusion.

Why it matters for female entrepreneurs

Most female founders carry their entire client roster in their head. That works at 3 clients. It breaks at 8. The Weekly Recap Generator externalizes the cognitive load and turns Friday afternoon into a 30-minute close-out instead of a 3-hour scramble. Your clients also notice when your communication gets sharper and more consistent — which compounds into renewals and referrals.

Build steps

1. Open your Custom GPT or create a new Project.
2. Paste this system prompt:

```
You are my weekly client recap generator. Each Friday I will paste in: 1) the client name, 2) what happened with them this week (notes, meetings, emails), 3) what's outstanding from their side, 4) what's outstanding from my side. Produce a one-page recap with: WHAT HAPPENED (3 bullets max), WHAT'S OUTSTANDING (their side + my side), WHAT NEEDS TO HAPPEN NEXT WEEK (3 specific actions), and a DRAFT FOLLOW-UP MESSAGE I can send the client to keep them in the loop. The follow-up message should be warm, brief (under 100 words), and end with a clear next step or question.
```

3. Block 30 minutes every Friday afternoon. Run the recap for each active client. Save the recaps in a Notion database or Google Doc.
4. Send the follow-up messages on Monday morning, not Friday — Monday opens get better response rates.

Tool needed

ChatGPT Plus or Claude Pro

Time to set up

15 minutes

Time saved per week

2-4 hours (and significantly cleaner Mondays)

WORKFLOW 05

The Proposal Drafting Workflow

What it does

Drafts a complete client proposal from a 5-minute briefing — in your voice, on your template, ready for you to edit and send within 20 minutes total.

Why it matters for female entrepreneurs

Most female founders take 60-90 minutes to write a proposal because they're starting from scratch each time. They're not starting from scratch — they're rewriting the same 80% they always write. The Proposal Drafting Workflow captures the 80% so you only have to focus on the 20% that's unique to this client. Result: more proposals sent, more deals closed, less Friday-night rework.

Build steps

1. Pull together 3-5 of your best previous proposals (the ones that closed). These become the training data.
2. Open your Custom GPT or create a new Project.
3. Upload the 3-5 proposals as files. Then paste this system prompt:

```
You are my proposal drafting assistant. Before writing, ask me for: 1) the client's name and business, 2) what they need (the problem in their words), 3) which of my offers fits (Brief, Build, Retainer, custom), 4) the investment level, 5) any specific scope details I want to include. Then draft a complete proposal in my voice, matching the format and structure of my uploaded proposal examples. Include: an opening that reflects their specific problem, scope of work, deliverables, timeline, investment, payment terms, and a warm close with clear next steps. Keep total length under 800 words. Use my exact voice.
```

4. Test it on your next proposal. Edit the output. Save what you change as a refinement note for future proposals.

Tool needed

ChatGPT Plus or Claude Pro

Time to set up

45 minutes (including time to gather proposal samples)

Time saved per week

2-4 hours (depending on how many proposals you send)

WORKFLOW 06

The Decision Support AI

What it does

Walks you through complex business decisions like a sharp advisor would — asking the right questions, pressure-testing your thinking, and helping you see angles you missed — so you make better decisions faster and stop second-guessing yourself at midnight.

Why it matters for female entrepreneurs

Female founders are often making 50+ decisions a day with no one to think out loud with. A spouse isn't an advisor. A team member can't be objective. A coach is too expensive to call for every decision. AI is patient, available at 11 PM, and trained on more business strategy than most consultants. It won't replace your judgment — it sharpens it.

Build steps

1. Open your Custom GPT or create a new Project.
2. Paste this system prompt:

```
You are my decision support advisor. When I bring you a decision, your job is to help me think clearly – not to give me an answer. Follow this protocol: 1) Ask me to state the decision in one sentence. 2) Ask me what I'm leaning toward and why. 3) Pressure-test that lean with 3 sharp questions. 4) Surface 1-2 angles I may not be considering. 5) Help me identify the underlying values or constraints I'm trying to honor. 6) Help me name what "good" looks like 6 months from now if I make this decision. Do not tell me what to decide. Help me decide. Be direct, warm, and willing to push back.
```

3. Use it for any decision you'd normally lose sleep over. Pricing changes, hiring, firing, scope creep, new offers, strategic pivots.
4. Save the conversations. Patterns emerge over time — you start to see your own decision-making blind spots.

Tool needed

ChatGPT Plus or Claude Pro

Time to set up

10 minutes

Time saved per week

Variable — but the quality of decisions improves measurably

WORKFLOW 07

The Content Repurposing Engine

What it does

Takes one piece of content you already created (a blog post, a podcast appearance, a long LinkedIn post, a newsletter issue) and turns it into 10 pieces of content for different channels — in your voice, ready to post.

Why it matters for female entrepreneurs

You're already creating valuable content — you just don't have time to repurpose it across every channel. The Repurposing Engine does that work in 15 minutes. Result: way more visibility from the same amount of content creation effort. Most female founders 5x their content output with zero additional writing time.

Build steps

1. Open your Custom GPT or create a new Project.
2. Paste this system prompt:

```
You are my content repurposing assistant. When I paste in a piece of long-form content (blog post, newsletter, podcast transcript), produce the following 10 repurposed pieces, all in my voice: 1) A LinkedIn post (200-300 words, opening hook, story arc, CTA), 2) An Instagram caption (under 150 words, warmer tone, 1 emoji max), 3) A Twitter/X thread (5-7 tweets), 4) Three LinkedIn poll/question posts, 5) A carousel outline (5 slides, one idea per slide), 6) A Facebook post (slightly more casual), 7) A pull-quote graphic copy (3 options), 8) An email subject line (3 options), 9) Three reply-bait questions for community engagement, 10) A 60-second video script. Match my existing voice across all outputs.
```

3. Each time you publish a long-form piece, run it through the Repurposing Engine. Save the outputs in a content bank.
4. Schedule the repurposed pieces over 2-3 weeks. One piece of content fuels weeks of social presence.

Tool needed

ChatGPT Plus or Claude Pro

Time to set up

20 minutes

Time saved per week

4-6 hours (if you're currently writing fresh social content from scratch)

WORKFLOW 08

The Daily Founder Stand-Up

What it does

A 5-minute morning conversation with your AI assistant that produces: today's three priorities, the one thing you're avoiding, the one decision you need to make, and the daily framework for staying focused — so you start every day with clarity instead of inbox-induced chaos.

Why it matters for female entrepreneurs

Most female founders start their day reactive: open email, scroll Slack, jump into the urgent-but-not-important. The Daily Stand-Up flips that. Five minutes of intentional structure at the start of your day produces 2-3 hours of focused execution. It's the highest-ROI 5 minutes you'll spend.

Build steps

1. Open your Custom GPT or create a new Project.
2. Paste this system prompt:

```
You are my daily stand-up coach. Each morning, run me through this 5-minute conversation: 1) Ask: "What did you accomplish yesterday?" Acknowledge it briefly. 2) Ask: "What are the three most important things to move forward today?" Help me prioritize if I list more than three. 3) Ask: "What's the one thing you're avoiding?" Help me decide if it needs to be done today or if it can wait. 4) Ask: "What decision are you sitting on?" Help me name it clearly even if I'm not deciding today. 5) Output: a clean daily framework with my 3 priorities, the avoidance item with a decision (do it / schedule it / let it go), the decision I'm holding, and one sentence of encouragement based on what I've shared. Be direct, warm, and brief.
```

3. Set a recurring morning calendar block (15 minutes) for this. Don't open email first.
4. After 30 days, you'll have data on what's actually pulling you off-focus.

Tool needed

ChatGPT Plus or Claude Pro

Time to set up

10 minutes

Time saved per week

Hours, indirectly — through focus and reduced context-switching

WORKFLOW 09

The Follow-Up Sequence Generator

What it does

Writes complete email follow-up sequences (3-5 emails) for any sales conversation, proposal sent, discovery call completed, or referral introduction — so leads don't slip through the cracks and you stop dropping balls.

Why it matters for female entrepreneurs

Most deals are lost not because the prospect said no — but because the founder forgot to follow up after the third email. Follow-up is where the money is. The Follow-Up Sequence Generator solves the "I don't have time to write a thoughtful follow-up" problem in 5 minutes. Result: dramatically higher close rates without dramatically more effort.

Build steps

1. Open your Custom GPT or create a new Project.
2. Paste this system prompt:

```
You are my follow-up sequence writer. When I tell you: 1) the type of follow-up (post-proposal, post-discovery, post-referral, re-engagement), 2) the prospect's name and business, 3) what we discussed or where we left things, 4) what I'm hoping to move toward – produce a 4-email follow-up sequence with: Email 1 (sent same day or next day: warm recap + clear next step), Email 2 (5 days later: value-add + soft reminder), Email 3 (10 days later: case study, story, or reframe), Email 4 (3 weeks later: gracious close-out with door left open). Each email under 150 words, in my voice, warm, direct, no salesy language. Include subject lines for each.
```

3. Every time you send a proposal or finish a discovery call, run the workflow immediately and queue the emails in your CRM or email scheduler.
4. Watch your close rate over 90 days. It will move.

Tool needed

ChatGPT Plus or Claude Pro + your email/CRM scheduler

Time to set up

20 minutes

Time saved per week

3-5 hours per week — and significantly higher close rates

WORKFLOW 10

The Meeting Notes + Action Items AI

What it does

Turns every meeting recording or rough notes into clean structured outputs: a one-page summary, a list of action items with owners and deadlines, draft follow-up messages to attendees, and a Notion/Drive entry — automatically.

Why it matters for female entrepreneurs

Most female founders take 15-20 minutes after every meeting to write up notes and figure out what to do next. That's 90-150 minutes per day if you do 6-8 meetings. The Meeting Notes AI compresses that to 5 minutes per meeting while producing better, more structured output that your team can actually act on.

Build steps

1. Pick a meeting transcription tool. Options: Otter.ai (free tier works), Fireflies.ai, Granola, or built-in Zoom transcription. Set it to auto-join your meetings.
2. Open your Custom GPT or create a new Project.
3. Paste this system prompt:

```
You are my meeting notes and action items assistant. When I paste in a meeting transcript, produce: 1) A ONE-PARAGRAPH SUMMARY (what was discussed, what was decided, what's outstanding), 2) A KEY DECISIONS LIST (3-5 specific decisions made), 3) AN ACTION ITEMS TABLE with three columns: ACTION | OWNER | DEADLINE, 4) DRAFT FOLLOW-UP MESSAGES to each attendee (under 100 words each, warm, brief, recap their specific action items), 5) A NOTION/DRIVE ENTRY with: meeting date, attendees, summary, decisions, action items, next meeting (if applicable). Format clean and copy-ready.
```

4. After every meeting, paste the transcript and run the workflow. Save outputs in a meeting log.
5. Send the follow-up messages within 2 hours of the meeting — that's when the conversation is freshest in everyone's mind.

Tool needed

ChatGPT Plus or Claude Pro + transcription tool (Otter.ai free tier works)

Time to set up

30 minutes

Time saved per week

5-10 hours (depending on meeting volume)

What To Do Next

Start with one

Read the Playbook once. Then pick ONE workflow to install this week. Just one.

My recommendation: start with Workflow #2 (Custom GPT in Your Voice). It's the foundation. Every other workflow is 10x better once your AI sounds like you.

Then come back next week and install another.

Subscribe to Her AI Edit

Her AI Edit is my weekly newsletter for female entrepreneurs done dabbling with AI. Every Monday morning at 7 AM MT, you get:

One AI workflow worth building

One strategic move worth making

One thing worth reading

Three minutes. Once a week. Free.

If you got this Playbook, you're already subscribed. Look for the first issue in your inbox Monday.

Want it installed FOR you?

The Owner's AI Brief is the fastest way to get custom AI running in your business.

In one 90-minute private working session, I'll build three of these workflows live on your tools — configured to your business, your voice, your standards.

90 minutes. \$297. You walk away with custom AI installed, not a list of homework.

Book your AI Brief at cljamesconsulting.com/ai-brief

Beyond the Brief

Once your Brief is complete, two paths forward:

The AI Chief of Staff Build — 4-week custom build, \$7,500-\$12,000

The Fractional AI Officer — embedded AI leadership, \$5,000-\$8,000/month

Both build on what we install in your Brief. The Brief is the entry point. Where you go from there is up to you.

Final Note

These 10 workflows represent maybe 30% of what's possible with custom AI in your business. The other 70% is specific to YOUR business, YOUR voice, YOUR clients.

That's what the Brief is for. That's what the Build is for. That's what I do.

Let's run it smarter.

— Cheryl L. James

Founder, CL James Consulting

Google AI Certified

Creator of Her AI Edit

Her AI EDIT

Ready to Install Custom AI?

The Owner's AI Brief is a private 90-minute working session where Cheryl builds three workflows live on your tools, configured to your business, your voice, and your standards.

Book your AI Brief
cljamesconsulting.com/ai-brief

Let's run it smarter.