lumin42

Free sample
AI Intelligence Vault

One complete playbook from the Vault, free, plus the full list of what's inside. Written for any business putting AI to work. Doable yourself, no coding, no setup from us.

5 pages

1 full playbook

12 in the full Vault

lumin42.com/store

What's inside the full Vault

12 step-by-step playbooks and 15 copy-paste templates in a members web app. Tick steps off as you go; it remembers your progress on phone or computer.

Section	Playbook	Time
Your business brain	**Write your business identity file** (this sample)	1 hour
Your business brain	**Build an FAQ bank from real questions**	2 hours
Your business brain	**A private AI assistant that knows your business**	1 hour
Your business brain	**A decision log that turns judgement into rules**	15 minutes a week
Connect and automate	**New lead to CRM, alert and reply (no code)**	1–2 hours
Connect and automate	**AI-drafted replies with a human approval step**	2 hours
Connect and automate	**A weekly summary that writes itself**	1–2 hours
Connect and automate	**A simple AI use policy for your team**	1 hour
Sell AI services	**Pick a niche and one painful problem**	2 hours
Sell AI services	**Package a productised AI service**	2 hours
Sell AI services	**Build a demo and proof before you pitch**	Half a day
Sell AI services	**Find your first three clients the right way**	1 hour a day

Sample playbook: Write your business identity file

A one-page file that tells any AI tool who you are, how you sound and what it must never do.

Time	Cost	Level
1 hour	Free	Beginner

Why it matters

AI starts every chat as a stranger. One well-written page turns generic answers into ones that sound like your business and follow your rules.

Tools

- A text editor or Google Docs
- ChatGPT, Claude or similar

Steps

1. **Describe the business**: What you do, who you help, your services, where you work and your opening hours, in plain sentences.
2. **Describe your voice**: Three to five rules, for example: friendly, plain English, short sentences, sign off as [name]. Paste two real messages you wrote that you're proud of as examples.
3. **Write ALWAYS and NEVER lists**: Always: use only facts in this file, ask one question when something's missing, end with a next step. Never: guess prices, dates or availability, promise what isn't confirmed, share private details, give legal, medical or financial advice.

Steps (continued)

4. **Write hand-over rules**: When the AI must pass to a human: complaints, upset customers, anything about money, safety or contracts, or questions the file doesn't cover.
5. **Test it**: Paste the file into a new chat and ask it to reply to three real enquiries. Fix the file (not just the answers) wherever it gets something wrong.

Copy-paste templates

> **Identity file:** BUSINESS: [name] WHAT WE DO: [one or two sentences] WHO WE HELP: [ideal customer] SERVICES: [list] AREAS AND HOURS: [ ] VOICE - [rule] - [rule] Examples of how we write: "[real message 1]" "[real message 2]" ALWAYS - Use only the facts in this file - Ask one clear question if something is missing - End with a clear next step NEVER - Guess prices, dates or availability - Promise anything we haven't confirmed - Share private customer details - Give legal, medical or financial advice HAND OVER TO A HUMAN WHEN - The customer is upset or complaining - The question isn't covered here - Money, safety or contracts are involved

Done when

- [ ] Business described
- [ ] Voice rules and examples added
- [ ] ALWAYS and NEVER lists written
- [ ] Hand-over rules written
- [ ] Tested on three real enquiries

Avoid these

- Write the NEVER list from real mistakes and near misses.
- Keep it to a page; longer files get followed less reliably.

The 90-day quick start in the full Vault

1. Week 1: Write your identity file and test it on three real enquiries.
2. Week 2: Build your FAQ bank and set up a private AI assistant.
3. Week 3: Lead to CRM, alert and acknowledgement flow.
4. Week 4: AI-drafted replies with your approval, and a team AI policy.
5. Month 2: Weekly summary and the decision log habit.
6. Month 3 (if selling AI services): pick a niche, package an offer, build a demo, start outreach.

Get the full AI Intelligence Vault

All 12 playbooks and 15 templates, £47 one-off, lifetime access, instant access after payment.
See inside: **lumin42.com/ai-vault**

© lumin42. Free to use in your own business. Tools, prices and rules change: check current details before relying on a step. Not legal advice.