The AI Employee Playbook

87 Ways Your AI Employee Can Work for You

For Dallas/Fort Worth Business Owners

What is this?

This is a trigger list — a quick reference of things your AI employee can handle so you don't have to. Keep it on your desk. Scan it when you're drowning in busywork and wondering "could the AI do this?" The answer is usually yes.

An AI employee isn't ChatGPT. It's not a chatbot you visit when you have a question. It's a system connected to your email, calendar, CRM, and business tools that works on your behalf — sending emails, scheduling meetings, following up on invoices, and handling the administrative grind that eats your week.

Think of it like hiring an executive assistant who never sleeps, never forgets, and can handle a hundred small tasks simultaneously.

Email

- **Clear your inbox, get to inbox zero** — it reads every email, archives the junk, flags what matters, and finally makes inbox zero realistic

- **Automatically draft replies to routine emails** — wake up to a drafts folder full of "Thanks for reaching out" and "Let me check on that" ready for your review

- **Follow up on emails that never got a response** — automatically sends "Just circling back on this" after 5 days, because you always forget

- **Morning briefing via message** — wake up to a text: "You have 4 meetings today, 12 emails that need your attention, and it's going to rain when you leave the office"

- **Get alerted immediately when a VIP emails** — your biggest client, your attorney, your spouse — you find out in seconds, not hours

- ☐ **Unsubscribe from newsletters you never read** — mass cleanup of a decade of "Subscribe to get 10% off"

- ☐ **Translate emails and draft replies in Spanish** — respond to clients in their language without thinking about it

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Calendar

- ☐ **Manage your calendar by texting** — "Move my 2pm to Thursday" and it's done. No opening an app, no clicking around.

- ☐ **Automatically prep you before every meeting** — 15 minutes before, you get a text: who you're meeting, what you last talked about, their LinkedIn, what they probably want

- ☐ **Catch double-bookings before they happen** — and suggest which one to move

- ☐ **Send follow-up emails after meetings** — "Great meeting at HG Supply Co yesterday, here's what we discussed, next steps are..."

- ☐ **Send personalized gifts after meetings** — remembers you mentioned a book, orders a copy sent to their office with a handwritten note

- ☐ **Coordinate with your spouse's calendar** — "Can we do dinner at Neighborhood Services Thursday?" It checks both calendars and makes the reservation.

- ☐ **Block focus time automatically** — protects your deep work hours from getting eaten by meetings

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Relationships & Personal CRM

- ☐ **Remember everyone you meet** — record a voice memo after every meeting ("Just met with Sarah, she has two kids, her son plays baseball at Highland Park, she's thinking about refinancing in the spring") and it's all searchable later

- ☐ **Prep you with context before calls** — pulls up everything you've noted about this person: their kids' names, what you talked about last time, that they're a Cowboys fan

- ☐ **Track birthdays and remind you** — "Tom's birthday is Friday — want me to send a card?"

- ☐ **Remember follow-up commitments** — "You told Jennifer you'd introduce her to your accountant. Want me to draft that email?"

- ☐ **Keep a relationship timeline** — when you last met, what you discussed, what you promised

To-Dos You Keep Putting Off

- ☐ **File that insurance claim** — you text "The fence blew down, here's a photo" and it files the claim, uploads the photos, and schedules the adjuster

- ☐ **Negotiate with car dealers** — it emails multiple dealers, plays them against each other, and saves you thousands without you making a single phone call

- ☐ **Check in for your flight** — finds the flight in your email, checks you in the moment the window opens, picks a window seat. You're already on 635 heading to DFW.

- ☐ **Order groceries when the list is ready** — your housekeeper texts what you need, it logs into the store, handles the 2FA code, and places the order

- ☐ **Dispute that charge on your credit card** — drafts the letter, sends it, follows up until resolved

- ☐ **Renew your business licenses** — tracks the deadlines, fills out the forms, reminds you to sign

- ☐ **Get quotes from contractors** — sends your specs to 5 roofers in Colleyville, compiles the responses into a comparison

- ☐ **Cancel subscriptions you're not using** — identifies zombie SaaS charges and cancels them

Sales & Following Up

- **Follow up on every proposal you sent** — 7 days later, "Just checking in on the proposal I sent last week" goes out automatically

- **Research prospects before sales calls** — their LinkedIn, their company, recent news about their Plano expansion

- **Follow up on overdue invoices** — increasingly firm emails, automatically, until they pay

- **Alert you when a deal goes cold** — "No activity on the Johnson deal in 14 days"

- **Clean up your CRM** — merge duplicates, fill in missing info from LinkedIn, delete the junk

- **Prospect new signups** — every morning, check who signed up yesterday and research if they're worth a call

- **Send a personal note after networking events** — "Great meeting you at the Chamber event last night"

Client Communication

- **Send appointment reminders** — text and email, 24 hours and 2 hours before

- **Reschedule appointments when clients ask** — they reply "Can we move to next week?" and it finds a new time, sends the invite

- **Answer basic client questions any time of day** — "What documents do I need to bring?" answered at 11pm, not the next morning

- **Send status updates proactively** — "Your loan is now in underwriting, here's what to expect next"

- **Collect missing documents** — "We still need your tax returns" sent every 3 days until they upload

- **Welcome new clients** — send onboarding info, what to expect, how to reach you

Operations & Vendors

- **Collect quotes from vendors** — sends the same RFQ to 5 suppliers, compiles responses into a spreadsheet

- **Track contract renewal dates** — alerts you 90 days before that software auto-renews for another year

- **Process vendor invoices** — matches to POs, flags discrepancies, forwards to accounting

- **Find coverage when someone calls in sick** — texts the team "Can anyone cover tomorrow 9-5?"

- **Order office supplies before you run out** — notices you're low on printer paper, orders more

- **Coordinate with your property manager** — submits maintenance requests, follows up

Accounting & Money

- **Generate invoices from your time entries** — pulls billable hours, creates the invoice, sends it

- **Chase overdue invoices** — Day 7: friendly reminder. Day 14: firmer. Day 30: "We need to discuss payment."

- **Categorize your credit card transactions** — turns the statement into a clean expense report

- **Turn email receipts into a spreadsheet** — forwards your Amazon receipts, gets back organized data

- **Track what you're spending on subscriptions** — "You're paying for 47 SaaS tools totaling $2,847/month"

- **Alert you to unusual expenses** — "There's a $3,000 charge at a hotel you've never used"

Industry: Mortgage & Lending

- ☐ **Track loan milestones** — application → processing → underwriting → closing, notify everyone at each stage

- ☐ **Collect missing documents from borrowers** — "We still need your W-2" until they upload it

- ☐ **Send rate lock alerts** — "Rates dropped to 6.25%, want me to lock?"

- ☐ **Follow up with past clients** — "It's been 2 years since we closed your loan, rates are down, want to chat about a refi?"

- ☐ **Calculate scenarios** — "What would their payment be at 6.5% vs 6.75%?"

Industry: Real Estate

- ☐ **Coordinate showing schedules** — buyer's agent, seller's agent, inspector, appraiser — all on the calendar

- ☐ **Track contract deadlines** — inspection period ends Tuesday, appraisal due Friday, closing in 3 weeks

- ☐ **Send closing countdown updates** — "7 days until closing, here's your checklist"

- ☐ **Research comps** — pulls recent sales in the neighborhood for your CMA

- ☐ **Follow up after open houses** — "Thanks for stopping by the Lakewood listing yesterday"

Industry: Insurance

- ☐ **Send policy expiration reminders** — 90, 60, 30 days out

- ☐ **Collect renewal information** — "Has anything changed since last year? New cars, home improvements, teenage drivers?"

- ☐ **Track claims status** — check the portal daily, update the client

- ☐ **Compare quotes across carriers** — compile options for client review

Industry: Law Firms

- **Track every deadline in your cases** — motion due dates, statute of limitations, court appearances

- **Send case status updates to clients** — "Your case is in discovery, here's what's happening"

- **Bill clients from your calendar** — saw you spent 2 hours in court, created the time entry

- **Track continuing education credits** — "You need 4 more CLE hours by December"

- **Collect new client intake information** — sends the questionnaire, reminds them to complete it, creates the file

Industry: Accounting

- **Chase down missing receipts** — "You have 14 transactions without receipts this month"

- **Send quarterly tax reminders** — "Q3 estimates are due September 15"

- **Prepare document requests for clients** — "I need these 12 things for your tax return"

- **Remind clients of deadlines** — extensions, estimated payments, year-end planning

Personal Life

- **Weekly meal planning** — considers your schedule, the weather (good grilling weather Thursday at the lake house on Grapevine), what's in season

- **Shopping lists sorted by store** — Costco run vs. Kroger run, no backtracking

- **Track your kids' schedules** — practice, pickups, permission slips, who needs to be where

- **Plan family trips** — research, book flights and the Gaylord Texan for the weekend, build the itinerary

- **Home maintenance reminders** — change HVAC filter, schedule pool service, renew home warranty

- **Get quotes for home repairs** — sends your specs to multiple contractors, compiles bids

- **Track warranties** — "Your dishwasher warranty expires in 30 days, here's what it covers"

- **Coordinate with your spouse** — shared calendar, shared shopping list, shared sanity

- **Suggest weekend plans** — "The weather's nice Saturday, White Rock Lake or the Stockyards?"

The Magic

- **It works while you sleep** — you wake up and yesterday's grunt work is done

- **It handles the 2-factor authentication codes** — logs into sites that require a text message code, waits for it, enters it

- **It learns what you care about** — after a month, it knows which clients are VIPs, which emails are junk, how you like things done

- **It suggests automations you haven't thought of** — "I noticed you send this same email every Monday — want me to handle it?"

- **It connects all your tools** — email, calendar, CRM, accounting, messaging — all working together

Ready to Hire Your AI Employee?

This playbook is just the start. Every business is different, and the best automations are the ones tailored to how *you* work.

Book a free 30-minute AI Opportunity Audit. I'll map out the top workflows an AI employee can take off your plate — and show you exactly what it looks like for your business.

openclawdfw.com/book

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