

package.md

06-llm-assistant-path/llm-connector-walkthrough.md

PS> boring fix lead-followup

status: practical, transparent, no hype

LLM Assistant / Connector Path

This path is for using ChatGPT, Claude, Gemini, or similar assistants to help with drafting, summarizing, and finding context.

It is not a replacement for your CRM, database, or spreadsheet.

Best uses

Use AI to:

- summarize messy lead messages
- draft a first reply
- rewrite replies in your business voice
- extract missing information
- search existing documents for service details
- turn intake answers into CRM notes
- check if a reply overpromises

Do not use AI to:

- be your only record of leads
- decide pricing without rules
- promise availability
- send sensitive replies without review
- store customer state in a chat thread

ChatGPT connector path

Potentially useful connections:

terminal

Gmail
Google Drive
Google Calendar
HubSpot
Airtable
Slack
SharePoint / OneDrive

Use case:

terminal

Find the related customer email, summarize the request, and draft a follow-up using our service notes.

Claude connector / MCP path

Potentially useful connections:

terminal

Google Drive
Gmail
Slack
Notion
GitHub
HubSpot / Airtable where available

Use case:

terminal

Read the lead context and internal SOP, then draft a clear response and list missing information.

Gemini / Google Workspace path

Potentially useful connections:

terminal

Gmail
Google Calendar
Google Drive
Google Docs
Google Sheets
Google Keep

Use case:

terminal

Search Workspace context, summarize the inquiry, and help prepare a response or next-step note.

Safe connector setup rules

- Connect only the tools needed for the task.
- Avoid broad access if a narrower folder/account works.
- Do not connect sensitive data unless you understand the provider's privacy and admin settings.
- Keep the source of truth in your CRM/database/sheet.
- Review AI-generated replies before sending.

Example assistant workflow

terminal

1. New lead lands in CRM/sheet.
2. Operator opens the lead context.
3. AI summarizes the original request.
4. AI drafts a reply using approved scripts and service notes.
5. Human reviews and sends.
6. CRM/sheet status is updated.

Example prompt

terminal

Using the lead details below and our service notes, draft a clear reply.

Rules:

- do not invent pricing
- do not promise availability
- ask for missing information if needed
- keep it under 120 words
- sound helpful, not salesy

Lead details:

{{lead_details}}

Service notes:

{{service_notes}}

> boring systems_

implementation package draft