

The agentic revenue starter kit

Everything you need to set up a small team where AI does the looking up, the first drafts and the routine steps, and people make the decisions. Paste-in commands, action plans, journey messages and a setup checklist, ready to use this week.

How to use this

1. **Do one part a day.** Each part is a checklist you can finish in under an hour.
2. **Paste, then adjust.** The commands, plans and messages are written to paste straight in. Change the wording until it sounds like your business.
3. **Keep a person on the send button.** AI drafts and prepares. Anything that reaches a customer gets read first.
4. **Review after two weeks.** The tracker on the last page tells you what to keep.

Day 1

One clean record

Day 2

Team commands

Day 3

Action plans

Day 4

Win-back journey

Day 5

Get paid, connect agents

Written for GuardenerAI. Screen names in bold match the app, so you can follow along click by click. The companion guide is at guardenerai.com/resources/guides/crm-for-agentic-revenue/.

Day 1: one record worth acting on

Part 1

AI is only as good as what it can see. Before you write a single prompt, get every customer onto one record and stop bad data at the door. Tick each box as you go.

☐ **01**
Import every customer list you have

Export each spreadsheet as CSV and import it. One list per import keeps mistakes easy to trace.

LISTS IMPORTED

☐ **02**
Set up duplicate rules

Under **Settings, Duplicate Rules**, decide what counts as the same customer, for example the same email address, or the same name at the same company.

☐ **03**
Check Duplicates the next day

Imports skip the real-time duplicate check and are caught by the overnight scan. Open **Duplicates** the morning after and merge field by field.

☐ **04**
Add validation rules for the fields routines read

An email on every Person, a close date on every open Opportunity. A routine that drafts a renewal email is only as good as the renewal date it finds.

RULES ADDED

☐ **05**
Add a custom object for what you actually sell

Properties, vehicles, projects, memberships. If you track it in a side spreadsheet today, it belongs on the record.

☐ **06**
Retire the side spreadsheets

Tell the team where customer details live from today. A second list is how records go stale.

DONE WHEN

Anyone on the team can open one Person and see their company, their open Opportunities and what happened last, without opening another tool.

Day 2: team commands to paste in

Part 2

Under **Settings, Commands**, create each command below with the name and slug shown, paste the prompt, and require a message where marked. Anyone on the team runs it by typing **/** and the slug in the chat. `{{message}}` is replaced with whatever the person types after the slug, and `{{today}}` with today's date.

Call prep

/call-prep

Before my call with `{{message}}`, find their Person record and company. List their open Opportunities with stage, value and close date, any open tasks, and the last thing that happened. Then give me three things to cover on the call. Keep it under 150 words.

Message required: yes (the customer's name).

Quote follow-up

/quote-follow-up

Draft a short, friendly follow-up to `{{message}}` about the proposal we sent. Mention the Opportunity by name, suggest one clear next step, and keep it under 120 words. Do not offer a discount. I will read and send it myself.

Message required: yes (the customer's name).

Log a call

/log-call

Here are my notes from a call: `{{message}}`. Find the right Person, add a note with a clean summary, and create a follow-up task for each action, each with a due date. Show me what you will create before you create it.

Message required: yes (the call notes).

My week

/my-week

Today is `{{today}}`. List my open Opportunities that close this month and my open tasks that are overdue. For each one, suggest a single next step. Group the list by customer.

Message required: no.

Handover

/handover

Write a handover on `{{message}}` for a colleague taking over: who they are, what we have sold or proposed, open tasks, anything promised, and what to do first. Use short headings.

Message required: yes (the customer's name).

GOOD TO KNOW

The assistant lists the records it finds; it does not add up totals. For exact figures such as **Revenue won**, open **Insights, Dashboard**. Drafts are yours to send: the assistant does not email customers on its own.

Day 3: action plans for routines

Part 3

An action plan is your best checklist, laid down as dated tasks the same way every time. Under **Settings, Action Plans**, create each plan below, choose what it applies to, and add the tasks in order. Then use **Apply action plan** on the record.

New client onboarding

Applies to: Company. Apply it the day a client signs.

TASK SUBJECT	PRIORITY	DUE
Send the welcome email and booking link	High	Day 0 from plan start
Kick-off call	High	Day 3 from plan start
Send kick-off notes and agreed next steps	Medium	1 day after the kick-off call is done
First check-in: is everything as expected?	Medium	Day 14 from plan start
Ask for a review or a referral	Low	Day 45 from plan start

Quote chase

Applies to: Opportunity. Apply it the day a proposal goes out.

TASK SUBJECT	PRIORITY	DUE
Confirm the proposal arrived	Medium	Day 1 from plan start
Follow up: questions or next step (run /quote-follow-up)	High	Day 4 from plan start
Call to decide: go, change or close	High	3 days after the follow-up is done
Update the stage and close date	Medium	1 day after the call is done

New enquiry

Applies to: Person. Apply it when an enquiry becomes a real conversation.

TASK SUBJECT	PRIORITY	DUE
Reply with an answer and a booking link	High	Day 0 from plan start
Second touch on a different channel	Medium	Day 2 from plan start
Qualify or close: budget, need, timing	Medium	Day 7 from plan start

GOOD TO KNOW

Action plans apply to a Person, Company or Opportunity, not to a Lead. Task reminders do not notify anyone, so make "check my tasks" the first thing each person does every morning.

Revenue leaks in the gaps between people. These two routines close them. Nothing pings anyone when a new lead arrives, so the routine is the alert.

Every morning, ten minutes

- Make sure every shared queue has a named person checking it today.
- Take new items with **Accept**, so the team can see who has what.
- Check **My queue work** and your overdue tasks.
- Run **/my-week** on Mondays.

Every Friday, twenty minutes

- Every open Opportunity has a dated next step.
- Every proposal sent this week has the Quote chase plan applied.
- Every new client has the onboarding plan applied.
- **Duplicates** is reviewed, and unpaid invoices are chased.

SHARED QUEUE	WHAT LANDS IN IT	CHECKED BY	BACK-UP

When to build a workflow instead

- **A command is enough** when the job is one question or one draft.
- **Build a workflow** under **Settings, Workflows** when the same few steps happen after every meeting or every new client. A **Process Meeting Minutes** workflow comes ready to start from.
- **Add an agent** under **Settings, Agents** when one step needs judgement, such as scoring an enquiry against your checklist. Agents run as steps inside workflows.
- **Remember:** workflows start when someone runs them from the chat, the assistant or the API, not on their own.

Your cheapest revenue is from people who already know you. Build these segments with **Describe the audience**, and check the conditions the AI proposes before you save.

SEGMENT	PASTE INTO DESCRIBE THE AUDIENCE
At Risk, email OK	"Persons in the At Risk RFM group who have agreed to email."
Champions	"Persons in the Champions RFM group who have agreed to email."
WhatsApp OK	"Persons who have agreed to WhatsApp."

Then build one journey: start when someone joins **At Risk, email OK**, send the email, wait five days, split on WhatsApp consent, send the WhatsApp message to those who agreed, and exit.

EMAIL SUBJECT

It has been a while, {first name}

EMAIL BODY

Hi {first name}, it has been a few months since your last {service}. A quick reminder that we are here when you need us, and this month we have {one real reason to come back: something new, a seasonal check, a useful tip}.

If it helps, you can pick a time here: {booking link}. Or just reply to this email and I will sort it.

{Your name}

WHATSAPP MESSAGE

Hi {first name}, it is {your name} from {business}. Just checking in since your last {service}. Would you like me to book you in? Reply here and I will find a time.

GOOD TO KNOW

To vary the wording, answer **What should this message achieve?** in the designer, pick a **Tone** and use **Generate copy**. Start WhatsApp messages from the WhatsApp template kits. Journeys split on what you know, such as consent or RFM group, not on opens or clicks, so read replies yourself.

☐

01

Connect a mailbox, then make booking links

Booking links need the owner's mailbox or a shared org mailbox to accept bookings. Then under **Settings**, **Booking links**, use **New booking link**, and sync your Google or Microsoft calendar.

☐

02

Send agreements for e-signature from the Person

The customer signs, with an optional countersigner on your side, and the signed copy is sealed with an evidence trail.

☐

03

Raise the invoice the day the work is done

Start from the Company, then **Submit for Review** and **Approve & Issue**. With the Accounting module on and on the Max plan, **Payment links** let customers pay by card through Stripe.

☐

04

Create one API key per AI tool

Under **Settings**, **API keys**. New keys are read only by default; give write access only to the tools that need it.

☐

05

Connect Claude or your own agent through MCP

Point it at your workspace's MCP server with its key. Start by asking it questions, and let it change records only once you trust its answers.

TOOL OR AGENT	KEY NAME	READ, OR READ AND WRITE	OWNER

GOOD TO KNOW

Invoices have no PDF and no automatic payment reminders, which is why chasing unpaid invoices sits on the Friday routine.

Measure the business result, not how often AI was used. Fill in the before column on day one and the after column two weeks later.

MEASURE	BEFORE	AFTER TWO WEEKS
Open Opportunities with no dated next step		
Proposals followed up within four days		
Time spent preparing calls each week		
Lapsed customers who booked again		
Commands the team uses every week		

Keep

Commands and plans the team used without being asked.

Change

Prompts whose drafts needed heavy editing.
Tighten the wording.

Drop

Anything nobody used. A shorter list gets followed.

Next

One workflow for the routine you still run by hand most often.

Want to set this up on your own customers? Start free at guardenerai.com, or book a walkthrough to see it on data like yours.