

AI in your CRM: a practical playbook for small teams

Where an AI assistant genuinely saves a small team time, the prompts worth copying on day one, how to turn your best routine into one the whole team runs, and the guardrails that keep it useful instead of risky.

How to use this

1. **Start with the jobs, not the tool.** Page 2 sorts the work your team does every week into "hand it over" and "keep it human".
2. **Copy the prompts as they are.** Page 3 has prompts grouped by job. Use them for a week before you write your own.
3. **Promote what works.** When one prompt gets used every day, turn it into a team command so everyone gets the same result.
4. **Track it for 30 days.** The adoption plan and the tracker on pages 7 and 8 tell you what to keep and what to drop.

Week 1

Ask on records

Week 2

Draft and summarise

Week 3

Team commands

Week 4

Bulk work and agents

Day 30

Keep, change or drop

The playbook works with any CRM that has an assistant built in. Where it helps, a short note says how GuardenerAI handles that step, so you know exactly what to expect.

An assistant inside your CRM is most useful for work that is repetitive, text-heavy and easy to check. It is least useful where the job is judgement, relationships or anything you could not undo. Sort your team's week into the two columns below before you try anything.

Hand it over

- Finding where a customer or deal stands before a call
- Summarising a long document someone attached
- Drafting a first version of a reply, a proposal note or a handover
- Creating the follow-up tasks after a meeting
- Updating the same field on many records at once, with a preview
- Turning a messy list into a clear next-steps plan for the week

Keep it human

- Deciding what to offer a customer and at what price
- Anything sent to a customer without someone reading it first
- Conversations that need tact: complaints, bad news, renewals at risk
- Deleting records or changing money owed
- Anything regulated, clinical or legal advice

The two-question test

- **Can someone check the result in under a minute?** If yes, the assistant can draft it.
- **Would a mistake be easy to undo?** If yes, the assistant can do it with a preview. If no, keep a person in charge of it.

[illegible]

Open the record first, then ask. An assistant inside the CRM is far more useful when it starts from the customer, deal or case in front of you than when it starts from a blank chat.

JOB	PROMPT TO COPY
Research a record	"Where do we stand with this company? List open opportunities, their stage and value, and anything overdue."
Prepare for a call	"Give me three things to cover on today's call with this person, based on their open deal and tasks."
Summarise a document	"Summarise the attached agreement in five bullet points. List every date and every amount, and flag anything unusual."
Draft a reply	"Draft a short, friendly follow-up to this person after our proposal. Mention the next step and keep it under 120 words."
Turn notes into tasks	"From these meeting notes, create follow-up tasks on this opportunity, each with an owner and a due date."
Qualify a lead	"Check this lead against budget, authority, need and timing. Say what is missing and whether to move it to Qualified."
Update in bulk	"Set the owner to Dana on every open opportunity at Globex. Show me the preview before you change anything."
Plan the week	"List my open opportunities with no activity in two weeks, and suggest one next step for each."

Prompts that work have three parts

- **The record or file it should use.** "This company", "the attached agreement".
- **The output you want.** Five bullets, a table, a draft under 120 words, tasks with due dates.
- **The check you want.** "Show me the preview", "flag anything unusual", "say what is missing".

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The assistant runs on Anthropic's Claude. It starts from the record you are on, with up to five of its tasks and the names of its files, and can search and update records with the same permissions as the person asking. It reads files you attach or mention. It does not read email threads, and it does not send email on its own: drafts are yours to send.

Every team has one person who writes the best follow-ups or the sharpest call notes. A team command packages how they do it, so a new hire gets the same quality on their first day and nobody has to remember the exact wording.

- ☐ **01**
Find the prompt people already reuse
Ask the team which prompt they paste most often. That one has already proved its worth.
- ☐ **02**
Write it for any record
Replace names and details with "this person", "this opportunity" or "the attached file", so the command works wherever someone runs it.
- ☐ **03**
Fix the output format
Say exactly what comes back: headings, bullet count, word limit, tone. Consistent output is the point of a command.
- ☐ **04**
Give it a short, obvious name
"/qualify", "/call-prep", "/handover". If people cannot guess the name, they will not use it.
- ☐ **05**
Decide who can run it
Most commands suit everyone. Ones that change many records belong to the people who own that data.
- ☐ **06**
Review it after two weeks
Read ten results. Tighten the wording where answers drifted, then announce the update.

COMMAND NAME	WHAT IT DOES	WHO RUNS IT	OWNER

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Admins write slash commands with a name and the prompt behind it, and choose which roles can use each one. Everyone runs them from the chat by typing a slash.

A command is a well-written question. An agent is a routine: a set of instructions, the tools it may use and the shape of its answer, which can be chained with actions such as creating a task or a note. Build one only when the same multi-step job happens every week.

USE	WHEN	EXAMPLE
A prompt	A one-off question or draft	"Summarise this proposal before my call."
A team command	The same question, asked by many people	"/call-prep" on any opportunity
An agent in a workflow	A repeatable routine that ends in actions	Score a new lead against your checklist, then create a discovery-call task and a summary note
A rule	A yes or no decision you can write down exactly	"A discount over 15% needs a manager", checked the same way every time

Signs a routine is ready to become an agent

- **You can write the steps down** in a numbered list without "it depends".
- **The tools it needs are few:** find records, create a task, add a note. Fewer tools mean fewer surprises.
- **The result is easy to check** on the record afterwards.
- **Someone owns it**, and will read the results for the first two weeks.

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Agents are built with instructions, a reasoning effort (Low, Medium or High) and temperature, the tools they may use and an output format. They run as steps in a workflow, which someone starts from a chat command or by asking the assistant. Custom tools wrap a rule you write, such as a discount policy, so agents and the assistant apply it the same way. Workflows do not start on a schedule or on their own.

The teams that get the most from AI are not the ones that trust it most. They are the ones that made it easy to check. Four habits cover almost every risk a small team faces.

- ☐ **01**
Same permissions as the person asking
The assistant should only see and change what the person using it could. Check that a Viewer cannot change records through the assistant either.
- ☐ **02**
Preview before anything in bulk
Any change to more than a handful of records should show the list first and wait for a yes. Read the count before you confirm.
- ☐ **03**
A person sends every customer message
Drafts are fast. Sending is a decision. Keep a human between the draft and the customer, especially for anything about money or bad news.
- ☐ **04**
Spot-check the facts
For summaries of contracts and invoices, compare every date and amount with the source. If a figure matters, check it against the document.

Never automate

- Deleting records
- Changing prices, discounts or amounts owed
- Promises about delivery dates or outcomes
- Anything legal, clinical or regulated

Write down for the team

- Which commands exist and what each is for
- Who owns each agent and reads its results
- What may never be pasted into a prompt
- Who to tell when an answer looks wrong

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The assistant acts with the permissions of the person asking, under the same roles as the rest of the workspace. Bulk changes run as a preview first, and the assistant asks before it writes anything in bulk.

Roll it out a week at a time. Each week adds one kind of work, so the team builds confidence on easy, checkable jobs before anything touches many records.

WEEK	WHAT THE TEAM DOES	DONE WHEN
Week 1	Ask on records. Everyone uses the research and call-prep prompts before calls.	Each person has used it on five real records
Week 2	Draft and summarise. Replies, handovers and document summaries, always read before sending.	The team prefers the drafts to starting blank
Week 3	Team commands. Turn the two most-used prompts into commands and announce them.	Commands are used more than the pasted prompts
Week 4	Bulk work and one agent. Bulk updates with previews, and one agent for one weekly routine.	The agent's results are checked and trusted
Day 30	Review. Keep what saved time, change what drifted, drop what nobody used.	A short written list of what stays

TRACKER	WEEK 1	WEEK 2	WEEK 3	WEEK 4
People using it				
Commands in use				
Drafts sent after editing				
Answers that were wrong				

Measure the business result, not how often the assistant is used. A tool used constantly that does not change how fast you follow up or how clean your records are is a novelty.

MEASURE	WHY IT MATTERS	BEFORE	AFTER 30 DAYS
Time to first follow-up	Faster follow-up wins more of the enquiries you already paid to get.		
Open deals with no next step	A deal with no dated next step is the first one to be lost.		
Time spent preparing calls	Prep time is the easiest hour to give back to selling.		
Records missing key fields	Clean records make every answer and report better.		
Drafts sent with light edits	Shows whether your commands produce usable work.		

Reading the numbers

- **Follow-up got faster but deals did not move:** look at the quality of the drafts, not the speed.
- **Lots of wrong answers:** the prompts are too vague, or the records are missing data the assistant needs.
- **Nobody uses the commands:** the names are not obvious, or they solve a problem nobody has.

The goal is a bigger team's output, not a clever chat.

The small teams that grow with AI treat it like a capable new hire: clear instructions, checked work, and more responsibility as it earns trust. Start with the jobs that are easy to check, keep people on the decisions that matter, and let the routine work run itself.

Start on records

Answers grounded in the customer in front of you beat answers from a blank chat.

Package what works

A team command turns one person's best routine into everyone's default.

Preview, then act

Anything in bulk shows its list first. Anything sent to a customer gets read first.

Connect your own agents

Tools such as Claude can work with your CRM through a secure connection, under keys you control.

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An MCP server lets Claude and other AI agents search, create and update records and work your queues, using API keys an admin creates, with the same limits as a member of your team.

Want to try these prompts on your own records? Start free at guardenerai.com, or book a walkthrough and we will run them on data that looks like yours.