

A top-down view of a desk with a laptop, a succulent plant, a calendar, and a clock. The text is overlaid on a dark grey semi-transparent rectangle.

The AI HANDOFF TOOLKIT

**DELEGATE AI TASKS WITHOUT
LOSING QUALITY (EVER)**

The AI Handoff Toolkit

For Teams, VAs, and Client Implementation...

You already know how to use AI strategically because you've gone through the playbook.

But if you plan to get help from someone else, whether that's a VA, editor, freelancer, content support, or even a client you're coaching, then you need to make sure they understand how to use AI inside your workflow too.

Don't worry... you don't have to teach it all manually. If someone is creating AI output on your behalf, they should have access to the playbook. You can absolutely give it to them.

Let them see the level of clarity, structure, and intent you expect. Then use this component to give them the streamlined version and handoff process.

You're about to learn how to transfer your prompting system to someone else quickly and effectively, without overwhelming them or losing your voice in the process.

This works even if you don't have a team yet. Keep it ready because the minute you bring someone in to help, this is what keeps them aligned with how you do things.

Section 1: How AI Handoff Works

Most people who use AI casually don't realize how much it matters how you instruct it. If someone helps you create content or strategy with AI, they must understand what you learned in the playbook.

If they'll be working with AI for you, they should read the playbook first. That's non-negotiable.

Tell them: "This playbook explains the standards I use when working with AI. Read it so you understand how I expect AI-generated work to be handled inside my business."

Once they've gone through the playbook, this component will show them exactly how to apply it to delegated work.

They don't need to be an AI expert. They just need to follow your system!

Section 2: The Quick Transfer Method

Here's where you give them the "entry route" to using the system properly without needing to learn prompting from scratch.

Before creating anything for you using AI, they should run this:

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"Before creating anything using AI, ask me the most important questions to clarify the purpose, audience, tone, and desired outcome of this task."
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This forces them to use clarity-first prompting, which is the foundation of everything in the playbook.

By this point they've seen how it works in the playbook and this component now gives them the fast-path version to apply it when working for you

Section 3: Prompt SOP to Use When Supporting You

Rather than trying to paraphrase the whole playbook, let them use its core process. Remind them they already have the full version (*because you gave it to them*). This is just the direct workflow in business environment terms.

AI Work Process When Supporting Me

- ⇒ Clarify with questions before writing.
- ⇒ Use the direction given and not assumptions.
- ⇒ Follow the structure required (format, tone, purpose).
- ⇒ Refine using AI before submitting anything.
- ⇒ Include the exact prompt(s) used when sending final materials.

If they've read the playbook, this makes complete sense to them. If they haven't? They'll try guessing and you'll notice immediately.

Section 4: You're Not Just Delegating Tasks... You're Delegating the System!

When you hand work off, make it clear that AI isn't just a tool for speed. It's part of how you think and execute strategy. They are not just writing. They're applying your method.

Use this statement when onboarding someone to work with you using AI:

"AI is part of how we work here. I expect it to be used the way it's outlined in the playbook you were given. If you're unsure how to prompt for something, refer back to the playbook before asking me."

That single reminder keeps standards high!

Section 5: Using This With Clients (*If You're Coaching or Consulting*)

If you work with clients and want them to understand how to use AI strategically, have them read the playbook too and then customize this component as part of your client delivery method.

Tell them:

“Start here for how to think about AI in your business (playbook). Then use this component to apply it with clarity inside your workflow.”

It's literally the difference between your client *“getting results with AI”* and *“getting stuck editing AI work that never lands.”*

Section 6: What to Hand Off

When giving this system to a VA or team member, give them:

1. The entire playbook
2. A short document titled *“How to Use AI When Working With Me” (we’ll create that next)*

That’s all they need! You’re not dumping training on them. You’re handing them a manual for how to execute accurately.

Section 7: Final Integration Note

This component exists because the playbook is more than a guide. It’s your AI operating method. Anyone working alongside you should have access to it so they can understand why you do things the way you do.

Think of it this way... You don’t want someone guessing what you’d approve. You want them prompting the way you would.

Giving them this component plus the playbook ensures that happens!

How to Use This Handoff Sheet

This section is meant to be copied, customized, and handed off to anyone who assists you with AI (*VA, freelancer, contractor, team member, or even a client*). To use it properly:

1. Copy the “How to Use AI When Working With Me” section. Paste it into your own doc or email.
2. Replace everything inside brackets with your information. Example: Replace [INSERT YOUR BUSINESS NAME] with the actual name of your business.
3. If you have additional style preferences, voice notes, or content requirements, add them before sending.
4. Give it to the person handling AI work along with this playbook, and tell them: “This is how I want AI handled in my business. Read the playbook to understand my system. Follow this sheet when doing AI work for me.”
5. Anytime AI-generated work doesn’t meet your standard, refer them back to this sheet.

You don’t need to re-teach them everything. Just hand this off and point them to the playbook.

How to Use AI When Working With Me

This guide explains how to use AI to support tasks, content creation, planning, and execution inside [INSERT YOUR BUSINESS NAME].

1. Read This First

Before using AI on any tasks you’re helping me with:

- ⇒ Read The AI Prompt Master Playbook so you understand how I work with AI.

⇒ Review this system sheet before starting any task.

⇒ Follow my voice style guidelines: [INSERT VOICE NOTES OR "REFER TO PLAYBOOK CHAPTER 3"]

2. Before Creating Anything Using AI

Always clarify direction first. Use this prompt:

"Before creating anything using AI, ask me the most important questions to clarify the purpose, audience, tone, and desired outcome of this task for [INSERT PROJECT NAME]."

Wait for my answers before generating content.

3. When Creating the First Draft in AI

Use:

"Create this using [INSERT TONE STYLE, EX: direct, conversational, confident]. Follow the structure provided. Do not add filler or generic phrasing. This must align with the intended outcome we clarified."

4. Before Sending Anything Back to Me

Refine it first:

"Evaluate the content you just produced based on clarity, tone accuracy, and alignment with [INSERT MAIN GOAL, EX: conversion, engagement, education]. Identify improvements and rewrite before submitting."

5. When Sending Work for Review

Always send:

⇒ Final version

⇒ The exact prompt(s) used

⇒ Any clarifying notes if direction was unclear

⇒ Notes on intentional changes (if any)

6. General Rules When Working With AI for My Business

[Insert your rules]

Don't assume clarify before writing

AI's first draft is never final

Use AI to get clarity before asking me

If unsure, ask AI first using:

"What questions should I ask [INSERT MY NAME] before finishing this task?"

7. Most Important

Your job is not just to use AI. Your job is to use AI the way I would without me having to do it.

Use the Builder! Follow the system! Clarity first!