The Ultimate AI Chief of Staff Blueprint

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A Less Doing Guide to Building Your Nexus in Tasklet

"The goal isn't to manage your schedule better. It's to build a system that fights for your time, attention, and energy — so you don't have to."

Before You Start: What This Is

This blueprint walks you through building an AI Chief of Staff (your "COS") inside Tasklet. Not a fancy to-do list. Not a calendar assistant. A persistent, autonomous intelligence that sits between you and the world — protecting your time, handling your communication layer, and surfacing what actually matters.

The system is built on the Less Doing methodology: **Optimize. Automate. Outsource.**

Every decision the system makes runs through one filter: *is this something I should be doing at all?*

What you'll build: - A daily intelligence briefing delivered to your inbox every morning - An inbox triage layer that knows what deserves your attention - Automated task intake via a dedicated email address - Proactive follow-up and reminder systems - A living knowledge base about your contacts, commitments, and patterns

What it takes: About 30–45 minutes of setup. Then it runs.

Part 1: The Onboarding Interview

Before connecting anything, answer these questions. Copy them into a message to your COS agent in Tasklet. This seed data is what makes the system feel like it knows you from day one.

Section A: Time & Availability

1. **What hours are you available for meetings?** (e.g., 10am–4pm, Mon–Fri)

2. **What is your "do not disturb" window?** (The time period where nothing gets through unless it's on fire)

3. **Are there any days or half-days that are always off-limits?** (e.g., Friday afternoons, Sunday mornings)

4. **What's your preferred delivery channel for your daily briefing?** (Email is recommended — choose an address you actually check in the morning)

5. **What time should your morning briefing arrive?** (Most people choose 6–7am, before the day starts moving)

Section B: Contacts & Relationships

1. **List your 5 Tier A contacts** — the people who always get through, no questions asked. (Name + email + why they matter)

2. **Are there any contacts who need extra care?** (Sensitive relationships, people going through something difficult, anyone where a wrong tone could cause real damage)

3. **What’s your dollar threshold for autonomous decisions?** (Below this, the system acts. Above this, it always asks you first. Common answers: $50, $100, $250)

Section C: Communication Preferences

1. **How do you prefer the system communicate on your behalf?**

    - Warm and casual (like a trusted colleague)
    - Professional and formal (like a traditional EA)
    - Match the tone of who it’s talking to

2. **If the system acts on its own and you’d have done it differently — do you want it to ask first next time, or is it fine that it tried?** (Your answer shapes how quickly the system builds autonomy)

3. **Are there any topics, people, or situations where the system should NEVER act autonomously?** (e.g., anything involving your kids, any legal matters, any financial commitments above threshold)

Section D: Work Context

1. **What is your primary role / company / focus area?** (One sentence. What do you actually do?)

2. **What are your two or three most important ongoing projects right now?**

3. **Who do you work with most frequently?** (Team members, clients, vendors — a quick list)

4. **What task management tool do you use?** (Trello, ClickUp, Notion, Asana, or something else)

Once you’ve answered these, paste them into a message to your Tasklet agent. It will store them and use them as the foundation for every decision it makes.

Part 2: Connect Your Tools

Your COS is only as good as the data it can access. Here's exactly what to connect and why.

The Core Stack (Essential)

Connect these first. These are the minimum viable COS.

✉ Your Primary Email (Gmail or Outlook)

Why: This is the main signal feed. Your inbox tells the system what's urgent, what needs follow-up, who's been waiting too long, and what can be ignored.

What the system will do: - Surface the 3–5 threads that actually need your attention each morning - Detect commitments you made that haven't been fulfilled - Flag threads that have gone cold and need a nudge - Skip newsletters, receipts, and automated notifications

How to connect: In Tasklet → Connections → Add Connection → Gmail (or Outlook)

> **Pro tip:** Connect a secondary work email too if you have one. The system handles multiple inboxes in a single briefing.

Your Calendar (Google Calendar or Outlook Calendar)

Why: The calendar is the truth. It shows what your time is actually committed to, where conflicts live, and what's coming up that needs prep.

What the system will do: - Include today's schedule in your morning briefing - Flag meetings that need prep or context - Alert you to conflicts before they become problems - Eventually: pre-meeting briefings 30 minutes before each call

How to connect: In Tasklet → Connections → Add Connection → Google Calendar (or Outlook Calendar)

📋 Your Task Manager (Trello, ClickUp, Notion, or Asana)

Why: The system needs to know what's in motion — what tasks are open, what's overdue, what you've committed to doing.

What the system will do: - Surface overdue or stalled tasks in your daily brief - Create new tasks when you assign work via email or chat - Track follow-up items so nothing falls through

How to connect: In Tasklet → Connections → search for your task manager

> **If you use Trello:** Create a dedicated board for COS-managed work. The system will create cards here for tasks it's tracking and move them to "Done" when complete.

The Extended Stack (Recommended)

Connect these after the core stack is running. Each one adds a new layer of intelligence.

□ Slack

Why: If your team communicates on Slack, the system can surface mentions and DMs that need attention — so nothing important gets buried in a channel you haven't checked.

What the system will do: - Include unread mentions and DMs from the past 24 hours in your morning brief - Flag anything time-sensitive from your team

How to connect: In Tasklet → Connections → Slack

□ Google Drive or OneDrive

Why: The system will maintain a living personal profile document — a permanent record of everything you share with it (travel IDs, family details, preferences, recurring info) so you never have to repeat yourself.

How to connect: In Tasklet → Connections → Google Drive (or OneDrive)

🏋 Oura Ring (or other health wearable)

Why: If you track sleep and recovery, this adds a biometrics layer to your morning brief. Sleep debt is a real performance variable — surfacing it daily keeps it front of mind.

What the system will do: - Include readiness score, sleep debt, and recovery trends in daily brief - Flag when you're running depleted (a signal to protect your calendar that day)

How to connect: Oura personal access token → add to Tasklet agent settings

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📬 AgentMail (Dedicated Task Inbox)

Why: This is one of the most powerful pieces of the system. You get a dedicated email address (e.g., `yourname@agentmail.to`) that functions as an instant task pipeline. Forward anything to it — an email, a PDF, a request — and the system picks it up and acts.

What the system will do: - Check this inbox on a regular schedule (every 30 min on weekdays) - Process any forwarded email as an explicit task assignment - Reply to you confirming what it's working on

How to connect: In Tasklet → Connections → AgentMail → Create inbox

> **The workflow:** Someone sends you something that needs action? Forward it to your agent inbox instead of letting it sit in your personal inbox. Done.

Optional Additions

Tool	What It Adds
Airtable	Structured tracking for anything recurring — invoices, applicants, inventory, contacts
Notion	Knowledge base integration, meeting notes, internal wiki access
Bland.ai	Outbound voice calls for scheduling, confirmations, or information gathering
Tesla API	Weather-based vehicle preconditioning (climate control before you leave)

Tool	What It Adds
LinkedIn	Contact intelligence enrichment

Part 3: Set Up Your Daily Brief

The daily briefing is the heartbeat of the system. It arrives every morning before your day starts and tells you exactly what to pay attention to.

What Goes In It

A good morning brief has exactly 7 sections — no more, no less:

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1. 🌥 Weather *(30 seconds)* Quick local forecast. Not a weather app — just enough to know if there's anything that affects your day.

2. Today's Calendar Meetings that need your attention, prep reminders, conflicts to resolve. Skip the routine stuff. Surface what matters.

3. Inbox Priority Queue 3–5 email threads across all connected inboxes, ranked by urgency + relationship importance. Source-labeled so you know which account it's from.

4. Slack Highlights Mentions or DMs from the past 24 hours that need a response. (Skip if you don't use Slack.)

5. Open Loops Tasks that are overdue, pending responses you're waiting on, or decisions that are queued. The "nothing falls through" section.

6. 🔍 One Proactive Flag Something the system noticed that you didn't ask about. A thread going cold. An upcoming commitment with no prep. A pattern worth flagging. One thing — that's it.

7. Biometrics *(if Oura connected)* Readiness score, sleep debt as the primary number, any trend worth noting.

How to Set It Up

1. In Tasklet → Triggers → New Trigger → Schedule

2. Set it to fire at your chosen time (6am, 6:30am, 7am — whatever works)
3. Set it to run every day (or weekdays only if you want weekends off)
4. The system will automatically pull from all connected tools and email you the brief

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Part 4: The Decision Framework

This is the most important concept in the entire system. Get this right and everything else follows.

Tier 1 vs. Tier 2

Every action the system takes is classified as one of two tiers:

Tier	Definition	System Behavior
Tier 1 (Reversible)	Can be undone with minimal effort or cost	**Act and inform** — system does it, then tells you
Tier 2 (Irreversible)	Major investment of money, time, or reputation	**Draft and wait** — system prepares, presents for your approval

Examples of Tier 1: - Sending a follow-up email to a vendor - Creating a calendar event - Adding a task to your task manager - Drafting a reply for your review - Setting a reminder

Examples of Tier 2: - Committing to a speaking engagement - Making a purchase above your threshold - Sending communication to 5+ people - Anything involving legal agreements - Anything involving family health decisions

> **The rule:** When in doubt, make it Tier 2. As trust builds, more actions graduate to Tier 1. Start conservative.

Part 5: Your Communication Architecture

The Internal Voice (System → You)

When the system talks to you, it should feel like a trusted colleague who already knows the context. Not a robot reading a status report.

Rules: - Lead with the action or answer. Context comes after. - Frame what to do about it, not just what happened. - Warm but direct. Casual enough to feel human. - Reference history when relevant. - No unnecessary questions. If it can make the decision, it does.

Good: *"David hasn't replied to your proposal — it's been 5 days. I've drafted a nudge. Want me to send it?"*

Bad: *"It appears that David has not responded to the email proposal you sent on [date]. Would you like me to send a follow-up communication?"*

The External Voice (System → Others)

When the system communicates on your behalf, it should feel like a competent person on your team — not an AI, not you.

Tier A contacts (VIPs): > *"Hey [First Name] — [Your name] has some time this week. Would Thursday at 11 or Friday at 2 work? Happy to shuffle things around."*

Tier B contacts (Partners, clients): > *"Hi [First Name], thanks for reaching out! [Your name] has availability Tuesday at 10 AM or Wednesday at 3 PM. Would either of those work for you?"*

Tier C contacts (New leads, discovery calls): > *"Hi [First Name], thanks for your interest. Before we get a call on the books, could you send over a quick 2-minute Loom sharing what you're working on? That way [your name] can come fully prepared."*

Rescheduling (any tier): > *"Hi [First Name] — quick heads up, [your name] had some schedule changes. I've got [Option A] and [Option B] available — which works better? Apologies for the shuffle."*

The Escalation Matrix

Situation	What Happens
Scheduling Tier B/C within normal rules	Auto-handled. You're notified after.
Scheduling Tier A, or breaking rules	Draft prepared. Waits for your approval.
Follow-up email (1st–2nd touch)	Auto-sent. You're notified after.
Follow-up email (3rd+ touch)	Escalated. "Try once more or drop it?"
Financial commitment above your threshold	Always escalated. Never auto-approved.
Anything involving family / children / health	Always escalated. No autonomous action.
Legal documents, contracts, NDAs	Always escalated. No interpretation.
Emotional or sensitive content detected	Logistics handled, emotional layer escalated.
Email to 5+ recipients	Draft + approve. No blast mistakes.

Part 6: Automations to Build First

Start with these. Each one delivers immediate value and is low-risk to configure.

🏆 Priority 1: Daily Brief

Covered in Part 3. Set this up first. It's the foundation everything else builds on.

Payoff: You start every day knowing exactly what matters. You stop using your inbox as a to-do list.

🏆 Priority 2: AgentMail Task Inbox

Set up your dedicated agent email and point the polling system at it.

Payoff: You can delegate anything by forwarding it to one address. No more "I'll deal with this later" emails that never get dealt with.

🏆 Priority 3: Task Manager Integration + Trello/ClickUp Cards

Connect your task manager. Create a "COS-managed" board or list.

Payoff: The system tracks everything it's working on for you in a place you can see. No black box.

□ Priority 4: Inbox Triage Rules

Configure the system to categorize your email — what it ignores vs. what it surfaces.

Payoff: Your inbox becomes a curated queue instead of a firehose.

□ Priority 5: Follow-Up Automation

Set the system to monitor open threads. If someone hasn't responded in X days, it sends a nudge (Tier 1 for most contacts).

Payoff: You stop losing deals and opportunities because of dropped follow-ups. This one is often worth more than everything else combined.

□ Priority 6: Calendar Event Creation from Email

When you get an email that references a meeting, trip, registration, or event — the system automatically adds it to your calendar.

Payoff: Nothing slips through because it "sounded like something to remember."

🔁 Priority 7: Recurring Reminders

Build time-based reminders for anything that recurs: quarterly payments, annual renewals, scheduled check-ins, deadlines with long lead times.

Payoff: Your future self stops getting surprised.

Part 7: The Personal Profile

One of the most underrated pieces of the system is a **living document** that holds everything you share with the COS over time.

What Goes In It

- Travel IDs, passport details, frequent flyer numbers
- Family members: names, birthdays, schools, relevant context
- Home address, secondary addresses
- Payment preferences (which card for what)
- Medical details relevant to scheduling (medical appointments, providers)
- Professional bios (short, medium, full — for different use cases)
- Headshot and standard press photo links
- Recurring vendor relationships and account numbers
- Dietary restrictions, preferences
- Any "always remember" personal details

Why It Matters

Every time you share a piece of information with the system, it gets written here. Six months from now, you won't have to re-explain your TSA number, your doctor's office number, or your preferred hotel chain. The system already knows.

How to set it up: 1. Create a Google Doc called "[Your Name] — Personal Profile" 2. Ask your Tasklet COS to use this as its memory document 3. Over time, whenever you share personal info, the system appends it here 4. Pin a link to this doc somewhere accessible (Trello card, Notion page, etc.)

Part 8: The Maturity Model

Your COS doesn't arrive fully formed. It grows with you.

Stage	Timeframe	What It Looks Like
New Hire	Week 1–2	Cautious. Asks more, acts less. Useful but deferential.
Learning	Weeks 2–4	Daily brief is live. Starting to build behavioral models. Mostly Tier 2.
Trusted	Months 2–3	Real inferences. Sharper briefings. Starting to push back. More Tier 1.
Indispensable	Month 6+	Handles most routine work autonomously. Shapes your days around what matters.

What accelerates growth: - Correct the system when it's wrong. Don't just ignore it. - Use the AgentMail inbox consistently. The more you delegate, the faster it learns. - When it gets something right, let it keep doing it. Silence = consent. - When it gets something wrong, one sentence of feedback is enough.

Part 9: Security Principles

These are non-negotiable defaults. Change them only with intention.

- **Minimum viable access.** The system gets only the permissions it needs for the task at hand.
- **No autonomous financial transactions.** It can research and recommend. It never purchases or moves money.
- **Family data is sacred.** Any action involving children requires explicit approval. No exceptions.
- **External communication audit trail.** Every email sent on your behalf is logged and reviewable.
- **Escalation always available.** If something feels off, any response of "stop" or "hold" pauses the system immediately.

Part 10: What to Expect in the First 30 Days

Week 1: Foundation

- Answer the onboarding questions
- Connect core tools (email, calendar, task manager)
- Set up daily brief
- Set up AgentMail inbox
- Let the system run for 3 days without intervention — just observe

Week 2: Calibration

- Correct anything in the daily brief that's wrong
- Adjust the inbox triage rules based on what it's surfacing
- Add your first Tier A contact details
- Start forwarding tasks to your agent inbox

Week 3: Expansion

- Connect Slack if relevant
- Configure follow-up automation for 2–3 key relationship categories
- Build first recurring reminders for known deadlines
- Start populating your personal profile document

Week 4: Trust

- Review what the system has handled autonomously
- Identify one or two Tier 2 behaviors that feel safe to move to Tier 1
- Check the open loops section of your briefing — anything that's been there more than 7 days is probably a decision you're avoiding

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Quick Start Checklist

Use this as your setup guide:

Day 1 (30 minutes) - [ ] Answer the 15 onboarding questions and share with your COS agent - [ ] Connect primary email (Gmail or Outlook) - [ ] Connect calendar - [ ] Connect task manager - [ ] Set up morning brief trigger (schedule + time) - [ ] Set up AgentMail inbox

Day 2 (15 minutes) - [ ] Review your first daily brief — correct anything that's off - [ ] Add your 5 Tier A contacts with context - [ ] Forward one real task to your agent inbox and watch it get handled

Week 1 (ongoing) - [ ] Connect Slack if relevant - [ ] Create your personal profile Google Doc - [ ] Build first 2–3 recurring reminders - [ ] Identify one follow-up sequence to automate

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The Three Feelings Test

At the end of your first week, ask yourself:

Relief: *"I don't have to remember that."* Are you waking up and finding that something you would have forgotten was already handled?

Leverage: *"That would have taken me 45 minutes."* Is the system doing things in the background that used to take real time?

Trust: *"I can let go of this completely."* Is there at least one category of work where you no longer feel like you need to supervise?

If you feel all three, you've built it right.

If you only feel one or two — something in the setup needs adjustment. Usually it's the triage rules (the system is surfacing the wrong things), the Tier classification (it's asking permission for things it should just do), or the onboarding data (it doesn't have enough context about what matters to you).

Go back to Part 1, fill in what's missing, and tell the system what it got wrong.

Advanced Configurations (Once You're Ready)

These are for users who've had the system running for 30+ days and are ready to go deeper.

The Mirror Audit

A one-time analysis of 12 months of email and calendar data that produces a report structured as: - **Optimize** — what to restructure - **Automate** — patterns that can be systemized - **Outsource** — commitments that shouldn't require your direct involvement - **Eliminate** — the stop-doing list (often the most valuable page)

Run this once you have all core tools connected. The system needs historical data to make this useful.

Pre-Meeting Intelligence Packets

30 minutes before each meeting, the system sends a brief: - Who you're meeting (context, relationship history, tier) - What was discussed last time - Any open commitments between you - One personalized conversation opener based on recent context

Weather-Based Automation Triggers

For users with smart home devices or connected vehicles: triggers based on morning weather forecasts. (Precondition your car, adjust your schedule buffer for bad weather days, etc.)

Invoice & Payment Tracking

For business owners with recurring receivables: automated 30-day invoice monitoring with escalating follow-up sequences. Catches slow-paying clients before they become problems.

Applicant Tracking Integration

For anyone hiring: connect Airtable or another ATS. The daily brief includes pipeline status — who's in what stage, what's stalled, what needs a decision.

One Last Thing

The system gets 1% better as a Chief of Staff every single day.

That's not marketing language — it's the design principle. Every time you correct it, it adjusts. Every time you let it act, it calibrates. Every time it handles something you would have handled yourself, it builds a model of what "you" would do.

In six months, you'll have something that genuinely functions like a Chief of Staff — not because it was pre-programmed that way, but because it learned from you.

Start simple. Stay consistent. Correct what's wrong. Trust what's right.

The leverage compounds.

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A Less Doing Production
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