AI-NATIVE PLAYBOOK: FROM SOLO TO SCALABLE



KEITH MOEHRING

CEO

L2 Digital










PLAYTHRU

2015 to 2025

Platform Builds	3 (2 golf / 1 mini)
New Feature Launches	12
Support Articles Published	24
Blog Posts Published	46
Marketing Activities	10
Cold Outreach	Dozens
AI Assisted Support Replies	0
Reporting Cadence	Monthly
Times Hacked	1



	First 10 Years	Last 10 Months
Platform Builds	3 (2 golf / 1 mini)	2 (1 golf / 1 mini)
New Feature Launches	12	20
Support Articles Published	24	57
Blog Posts Published	46	50
Marketing Activities	10	100+
Cold Outreach	Dozens	100s
AI Assisted Support Replies	0	50+
Reporting Cadence	Monthly	Daily
Times Hacked	1	0



L2 DIGITAL

PLAYTHRU



80%

Client work
completed by AI

20-30 hrs to

5-8 hrs

per client, per month

Not a refined process

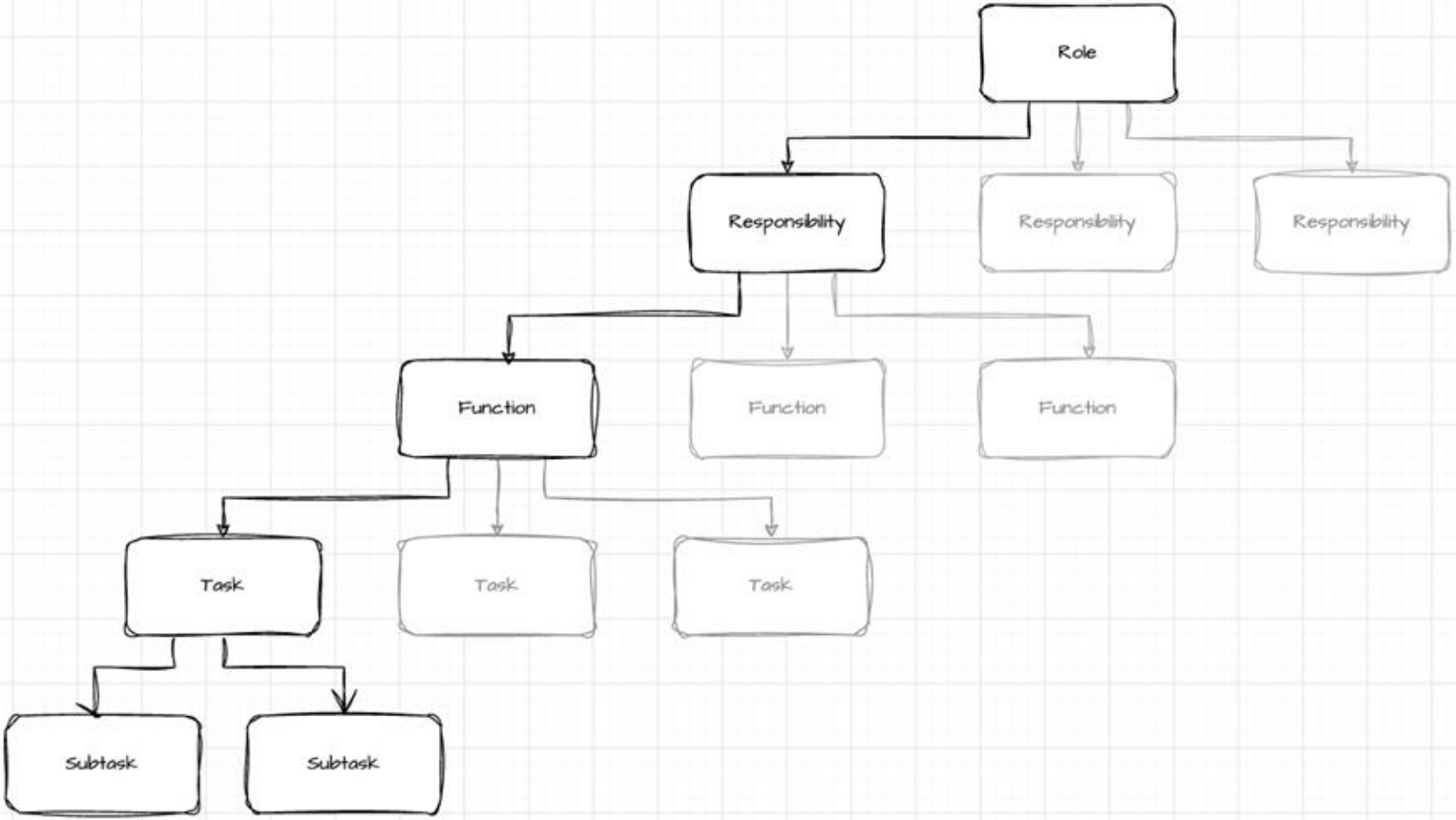
Not starting to use AI

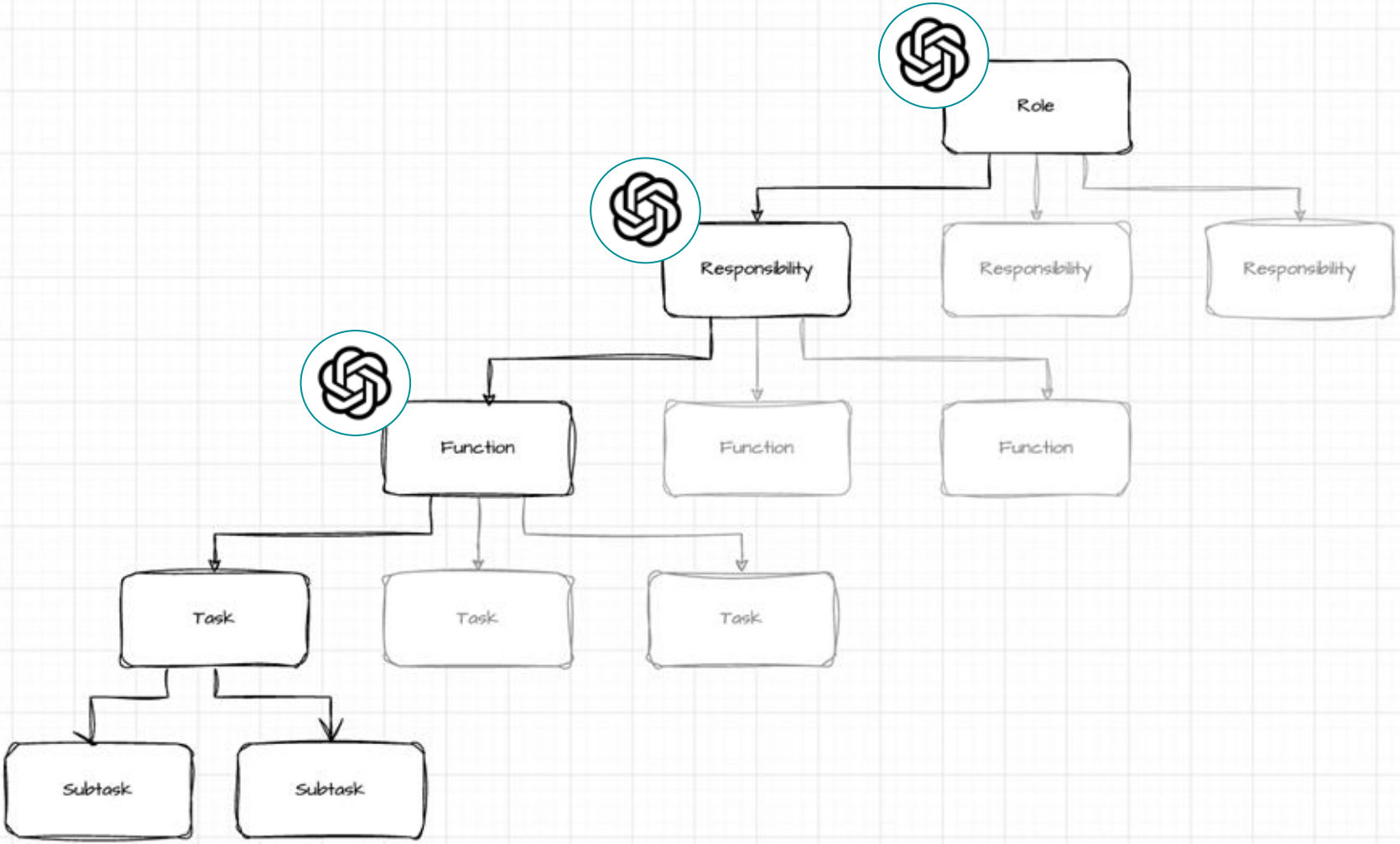
Built a business operating system and connected it to AI

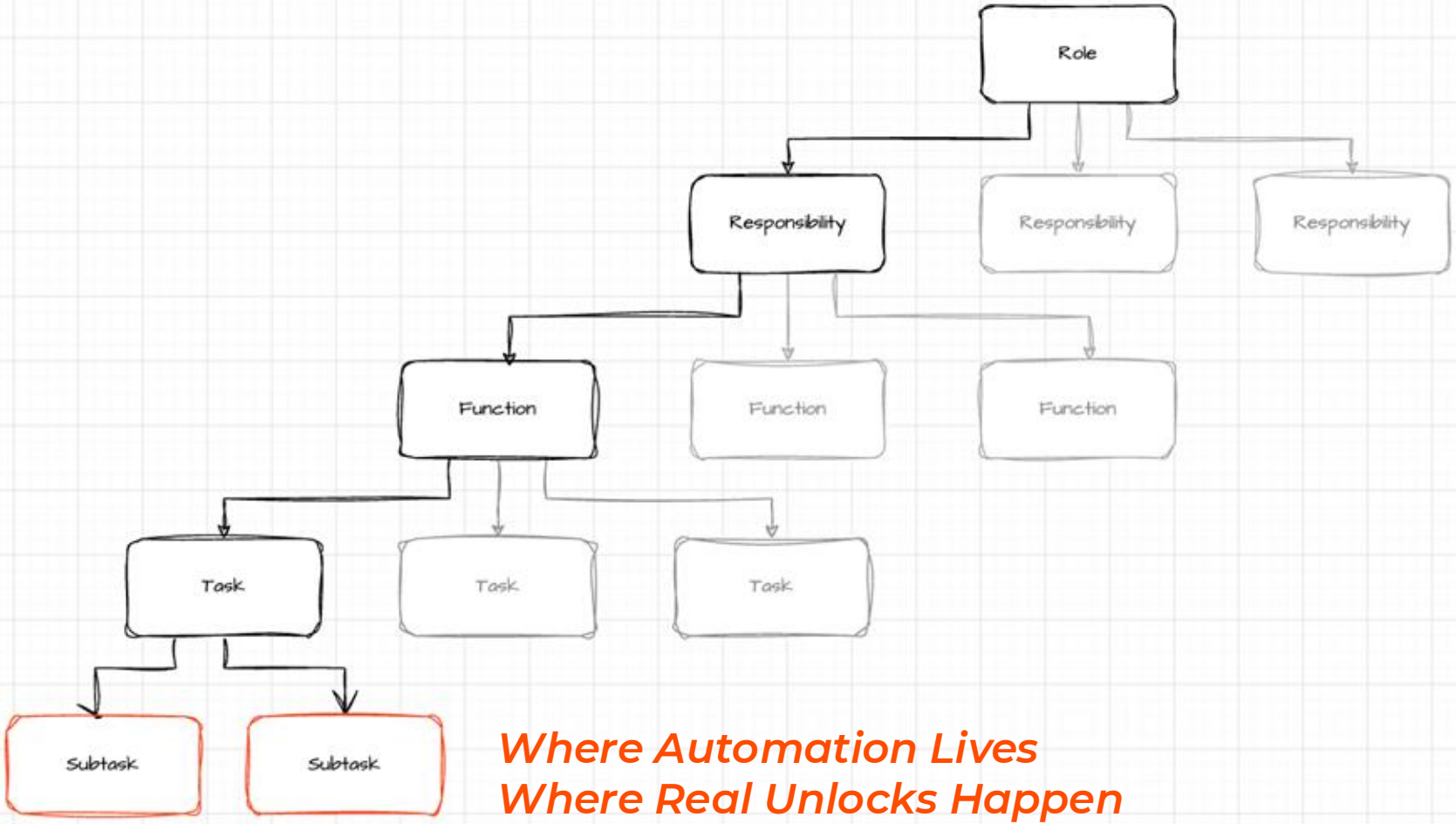

L2-Ops

AI Native

Creating a Business Operating System

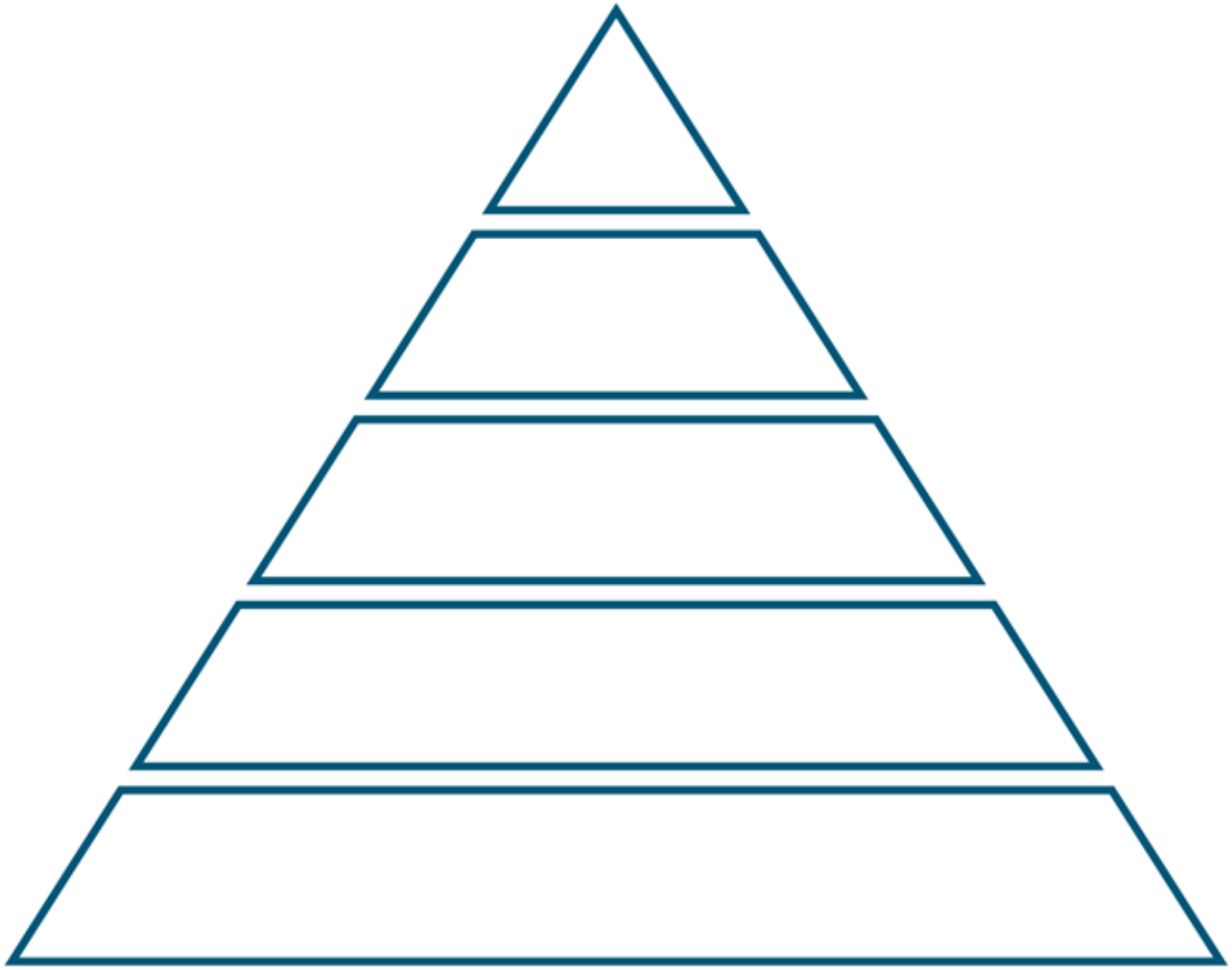

Role
Responsibility
Responsibility
Responsibility
Function
Function
Function
Task
Task
Task
Subtask
Subtask

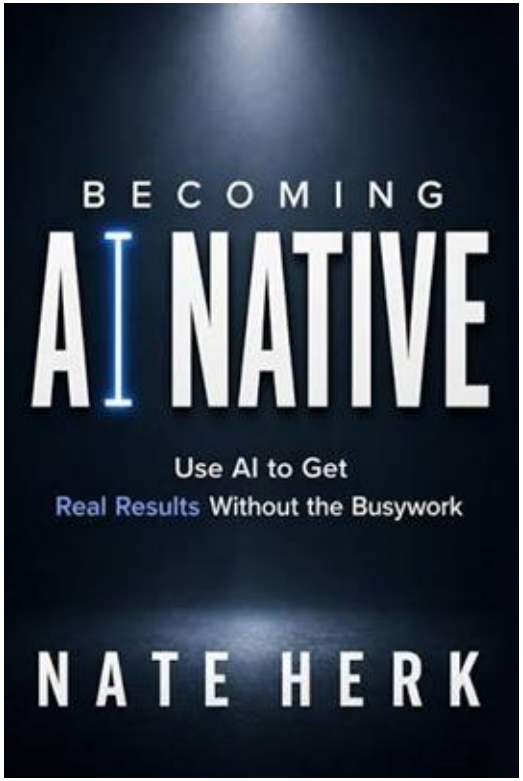

Role
Responsibility
Responsibility
Responsibility
Function
Function
Function
Task
Task
Task
Subtask
Subtask



Where Automation Lives
Where Real Unlocks Happen

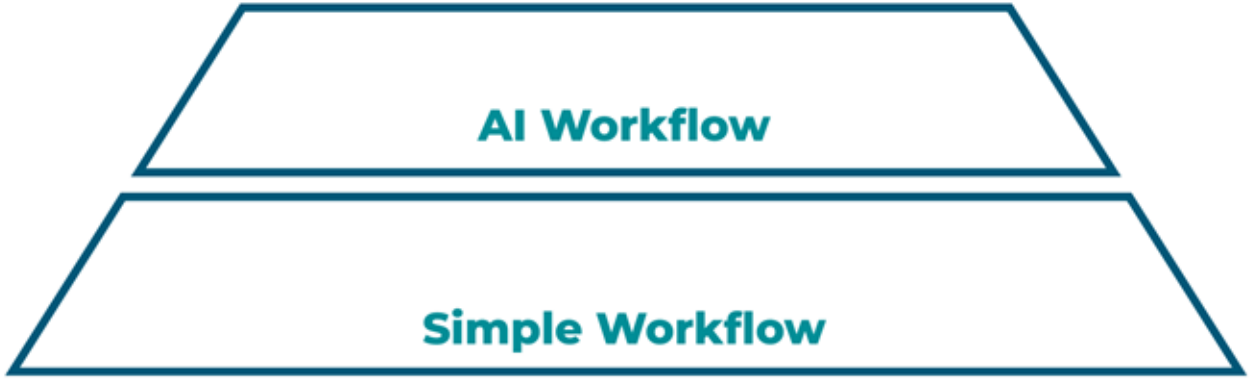
Ways to Automate with AI



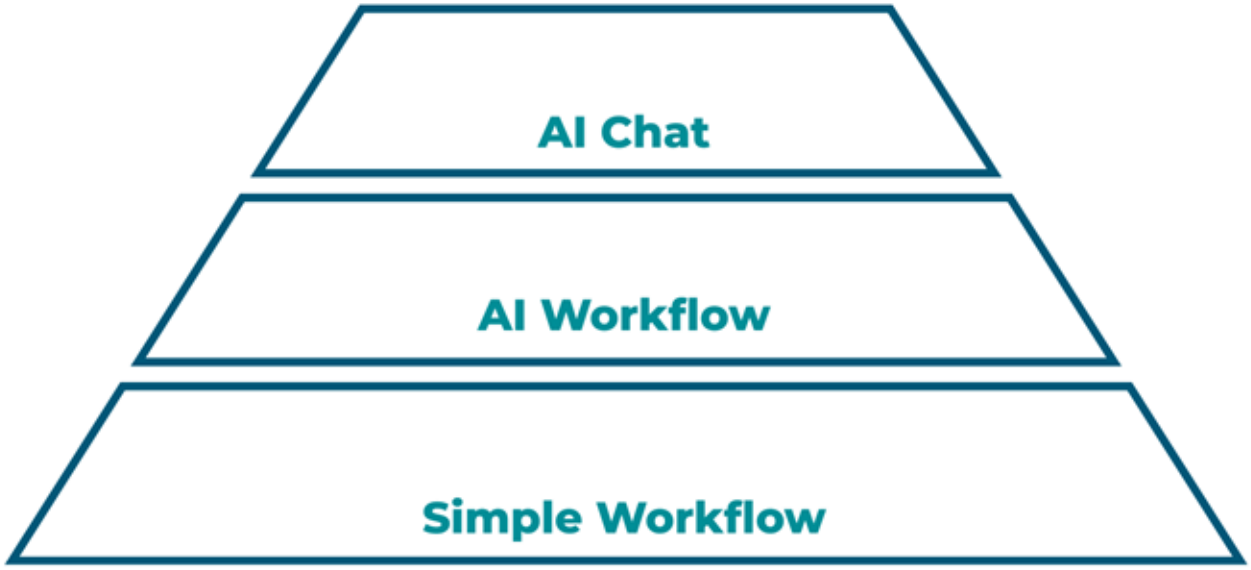

BECOMING
AI NATIVE
Use AI to Get
Real Results Without the Busywork
NATE HERK

Simple Workflow




AI Workflow
Simple Workflow


JSON
Parse JSON
Google Sheets
Search Rows
OpenAI (ChatGPT, Whisper)
Message an assistant (deprecated)
Gmail



Work

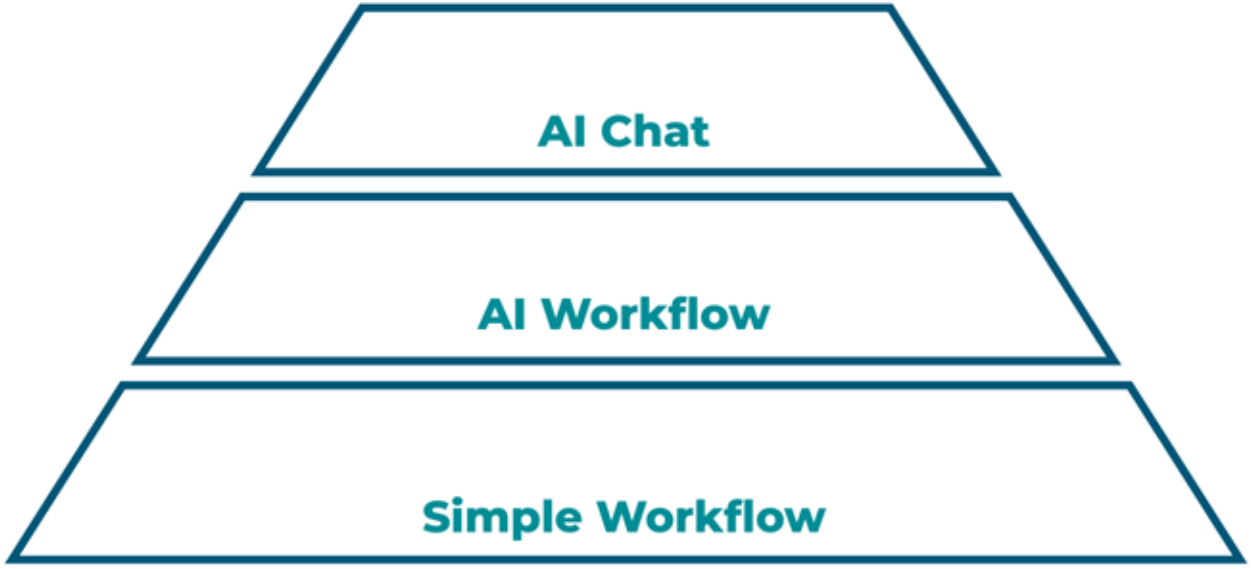
When is it OK to cut the sleeves of my tee shirts?

If you mean **turning a T-shirt into a sleeveless shirt**, anytime—it's your shirt! It's perfectly fine for workouts, yardwork, the beach, or hanging out casually. Probably skip it for work, nicer restaurants, or events with a dress code.

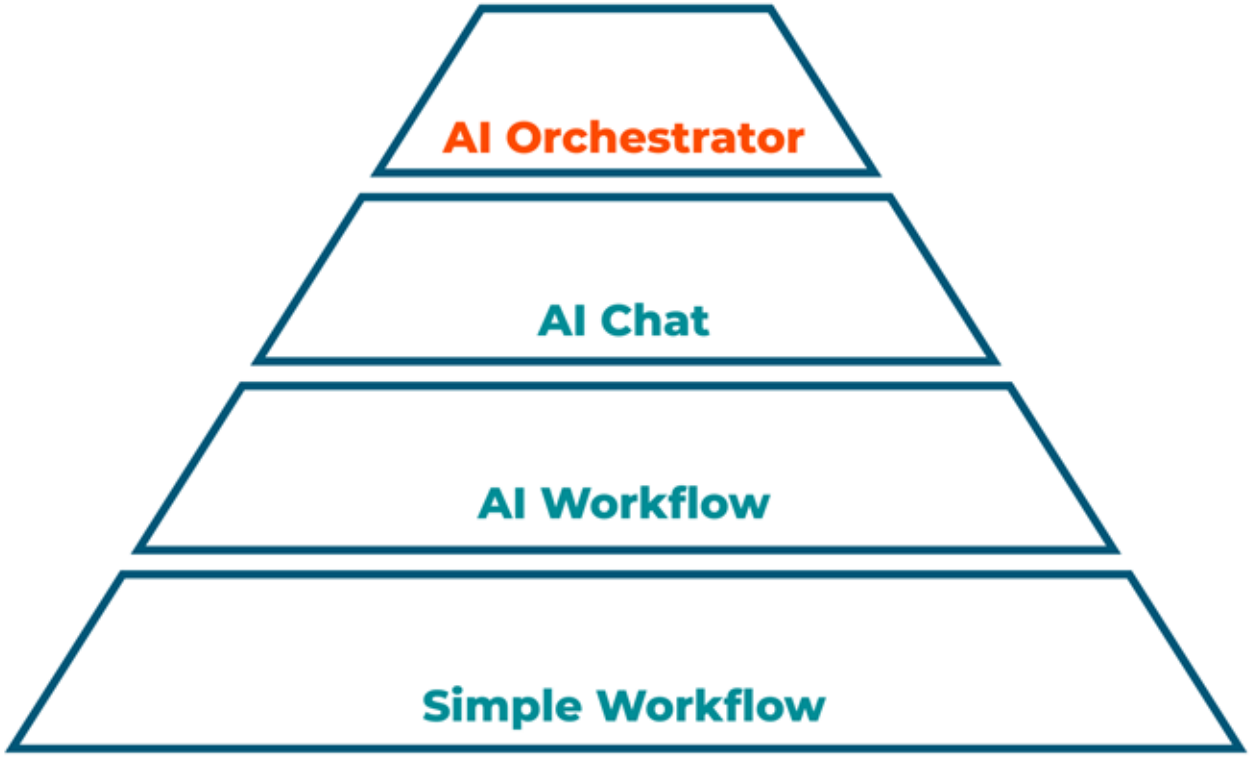
If you mean **when a shirt is ready to sacrifice**, an old favorite with stained armpits, tight sleeves, or worn cuffs is a prime candidate. 😂

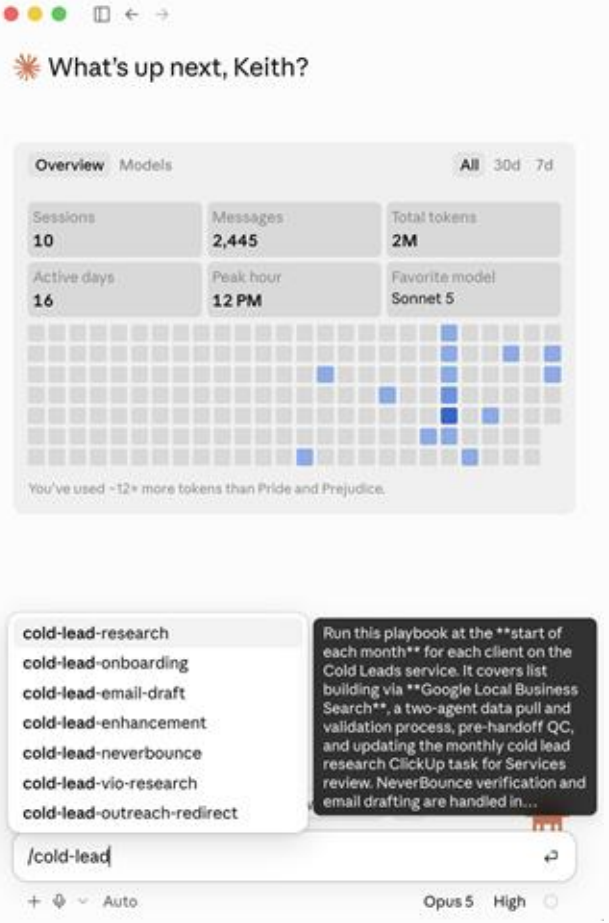
Work on anything

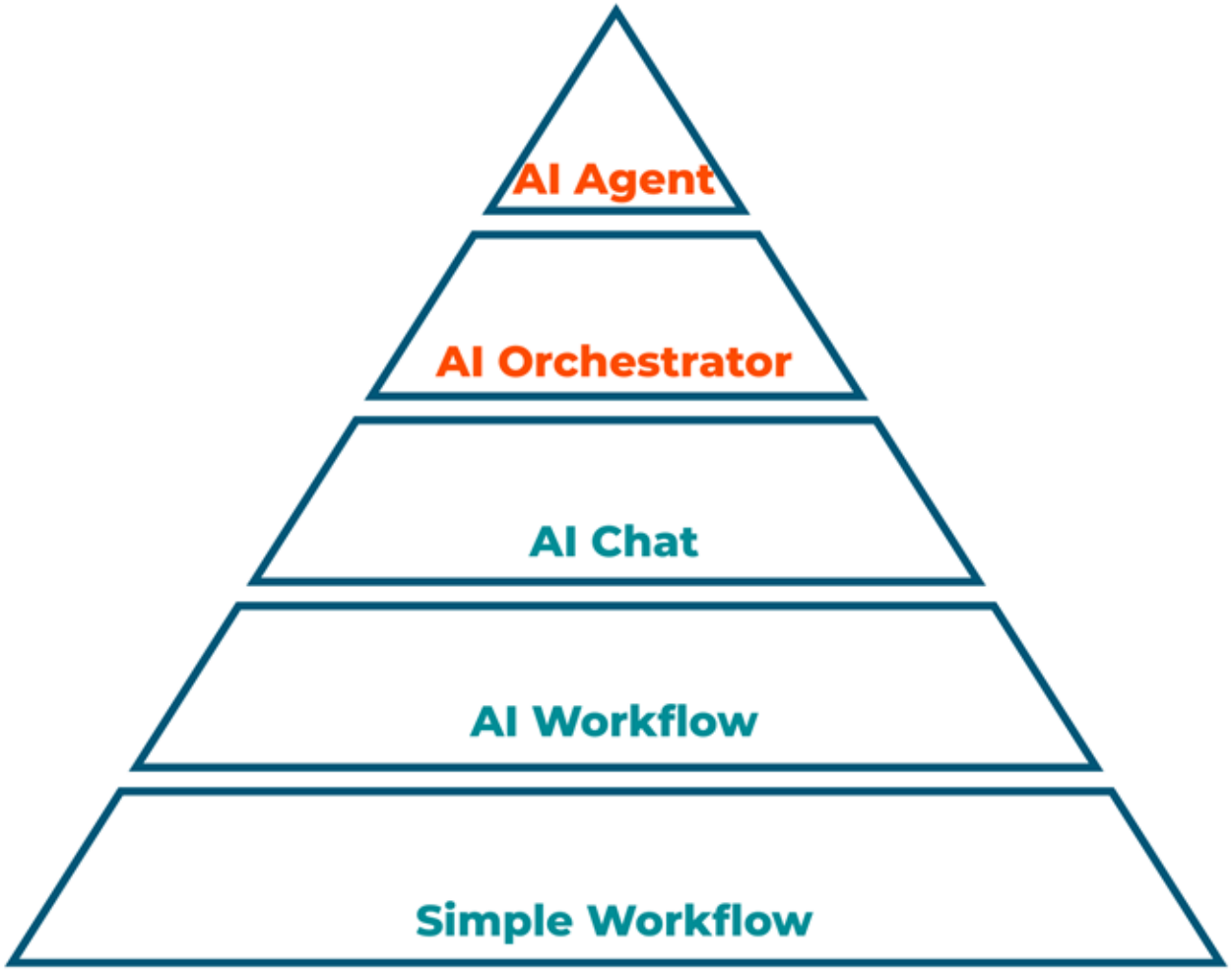
GPT-6 Astra Medium



Where I've Lived for 3 Years


AI Orchestrator
AI Chat
AI Workflow
Simple Workflow


What's up next, Keith?
Overview
Models
All
30d
7d
Sessions
10
Messages
2,445
Total tokens
2M
Active days
16
Peak hour
12 PM
Favorite model
Sonnet 5
You've used ~12× more tokens than Pride and Prejudice.
cold-lead-research
cold-lead-onboarding
cold-lead-email-draft
cold-lead-enhancement
cold-lead-neverbounce
cold-lead-vio-research
cold-lead-outreach-redirect
Run this playbook at the **start of each month** for each client on the Cold Leads service. It covers list building via **Google Local Business Search**, a two-agent data pull and validation process, pre-handoff QC, and updating the monthly cold lead research ClickUp task for Services review. NeverBounce verification and email drafting are handled in...
/cold-lead
Auto
Opus 5
High



go

Worked for 2m 39s

Built and smoke-tested. Here's what's in place:

Tools

- `tools/fetch_support_threads.py` — HubSpot pull (`--from-last-run` / `--hours` / `--thread-id`)
- `tools/retrieve_support_context.py` — FAQ + support-article matching
- `tools/apply_support_feedback.py` — feedback log + optional FAQ patches

Skill / workflow

- `.claude/skills/support-reply/SKILL.md` + `.agents/skills/support-reply/SKILL.md`
- `workflows/support_reply.md`
- Listed in `AGENTS.md` / `CLAUDE.md`

Knowledge

- `support-knowledge/reply_style.md`
- `support-knowledge/edge_cases/README.md`
- `support-knowledge/feedback_log.jsonl`
- `support-knowledge/codex_scheduled_task_prompt.md` ← paste into Codex Desktop hourly task

Try it

```
cd /Users/keithmoehring/PlayThru_HQ
.venv/bin/python tools/fetch_support_threads.py --hours 2 --status OPEN --li
.venv/bin/python tools/retrieve_support_context.py --threads-json .tmp/suppo
```

Or `/support-reply` with a thread ID / pasted email.

Codex schedule: open this project → new hourly scheduled task → paste `support-knowledge/codex_scheduled_task_prompt.md`.

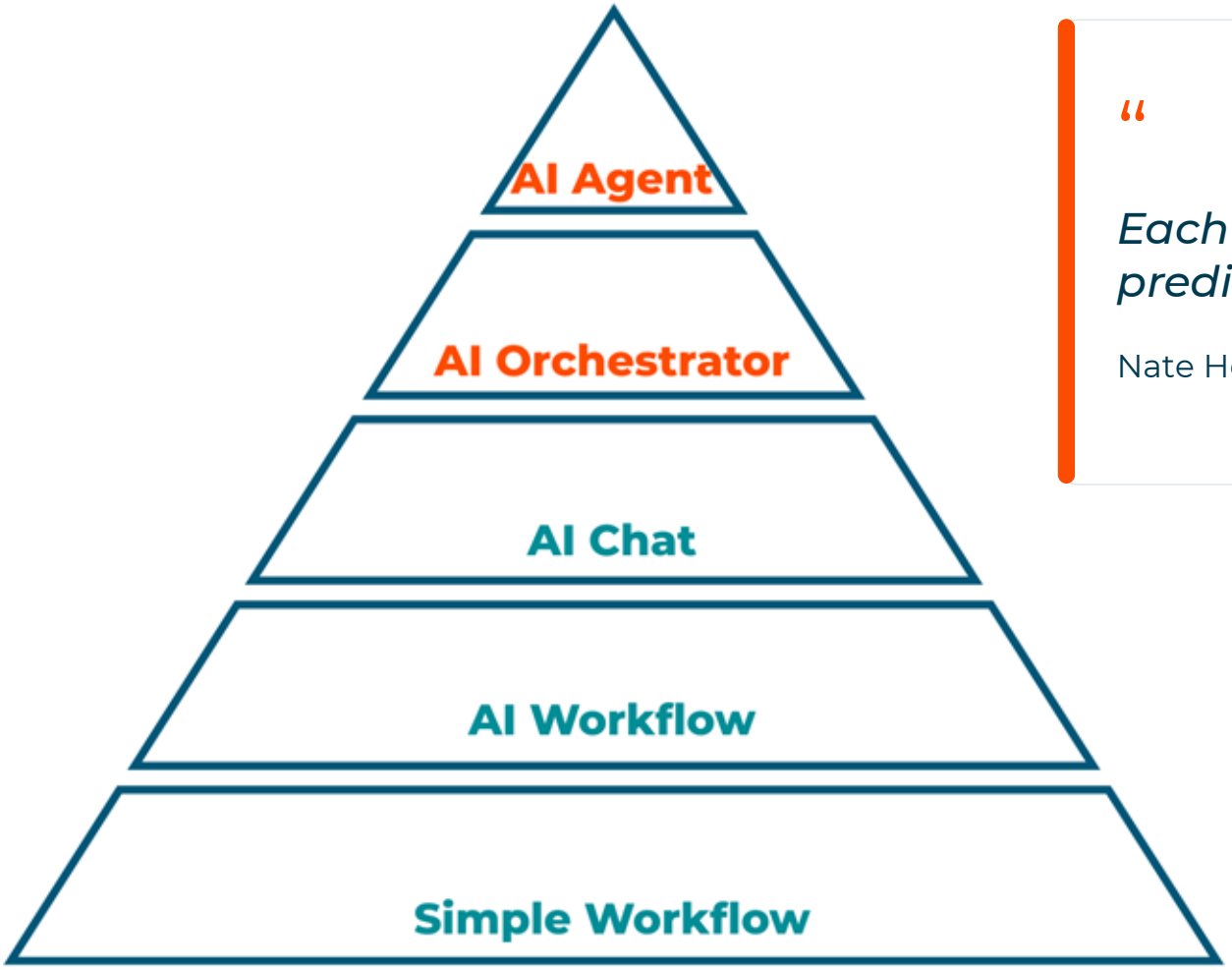
/playthru-support-upload upload articles 61-68

Worked for 55s

10 Files Undo All Keep All Review

Plan, Build, / for skills, @ for context

Agent Auto



> *Each rung up trades predictability for capability*
>
> Nate Herk

How do

AI Orchestrators

Work?




Kiss
the AI


Kiss
the AI
Skills


Kiss
the AI
Resources
Skills


Kiss
the AI
Resources
Tools
Skills


Kiss
the Al

“Run cold lead research for Client X targeting plumbers in Cleveland”

“Run cold lead research for Client X targeting plumbers in Cleveland”

Skill

“Run cold lead research for Client X targeting plumbers in Cleveland”

Skill Resources

“Run cold lead research for Client X targeting plumbers in Cleveland”

Skill Resources Tools

“Run cold lead research for Client X targeting plumbers in Cleveland”

Skill Resources Tools



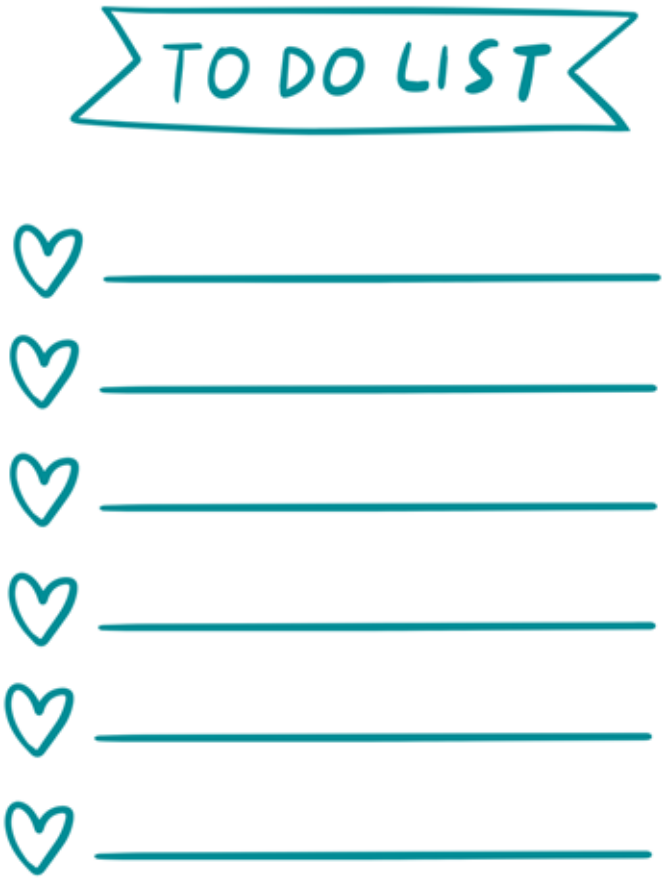


Automating a Subtask

Part 1: Prep Work

Pick 1 Subtask

"Googling local plumbers in a geographic region and then pulling contact information from their websites."



Do It Manually 5 Times

Write down every step

Write down every decision

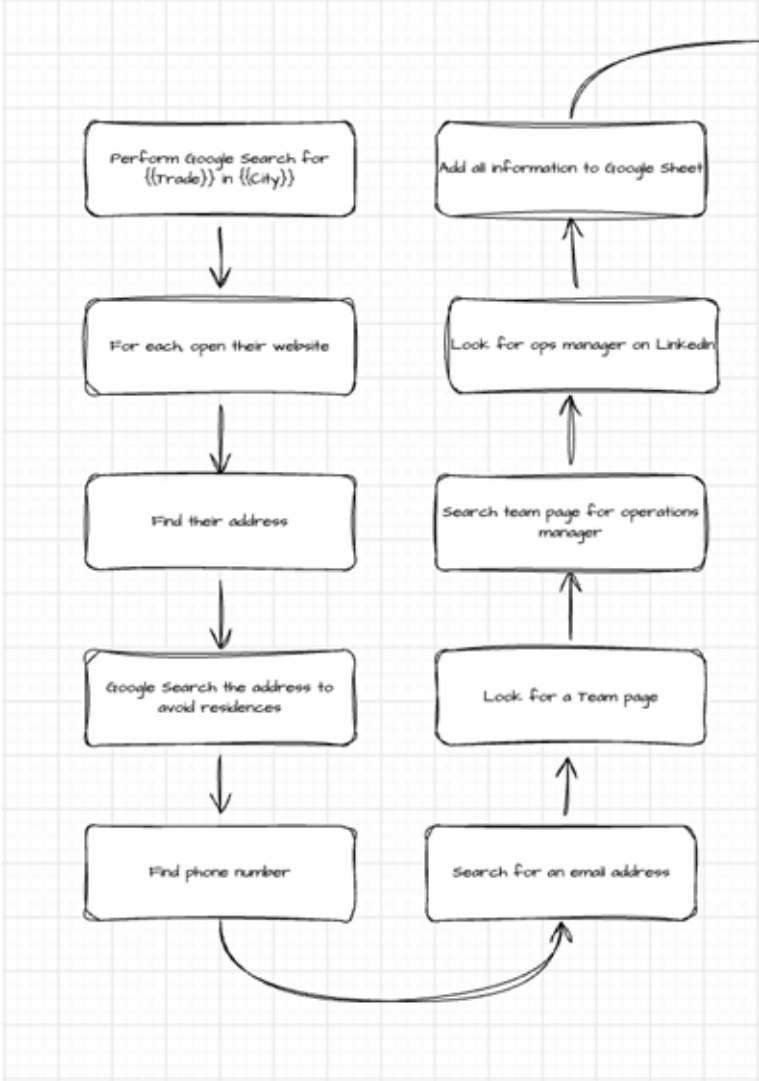
Note anything that complicates or confuses the process

Document any tips or tricks

Time yourself

Diagram It

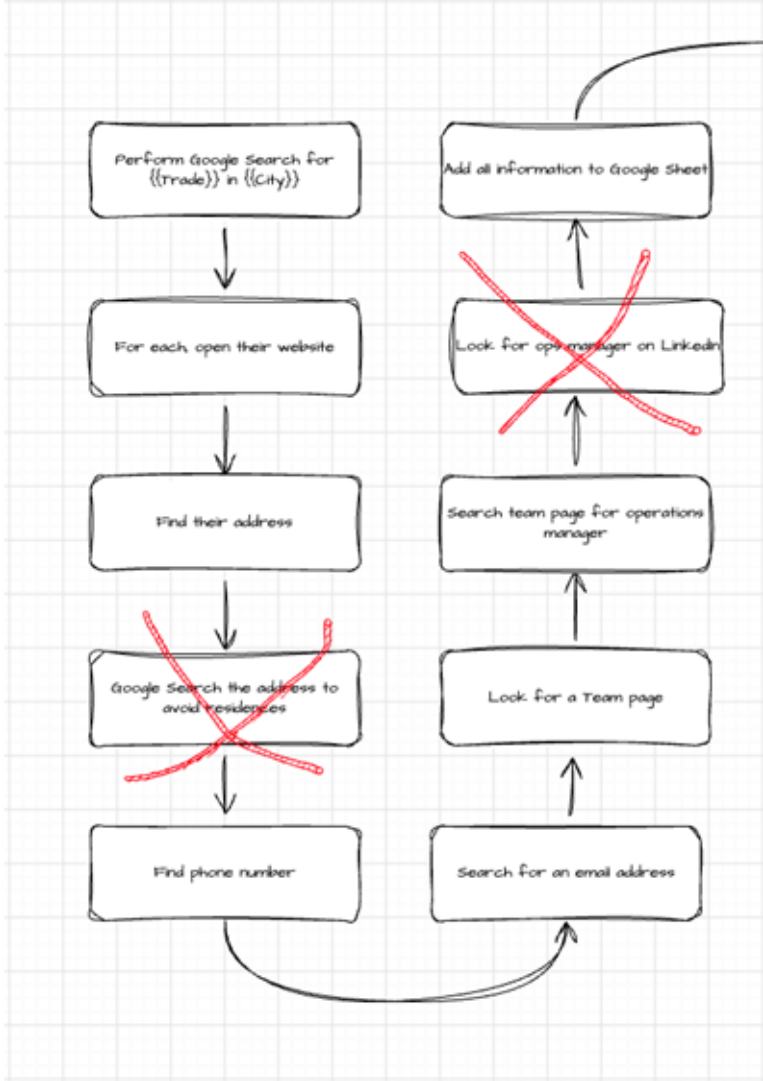
draw.io Lucidchart

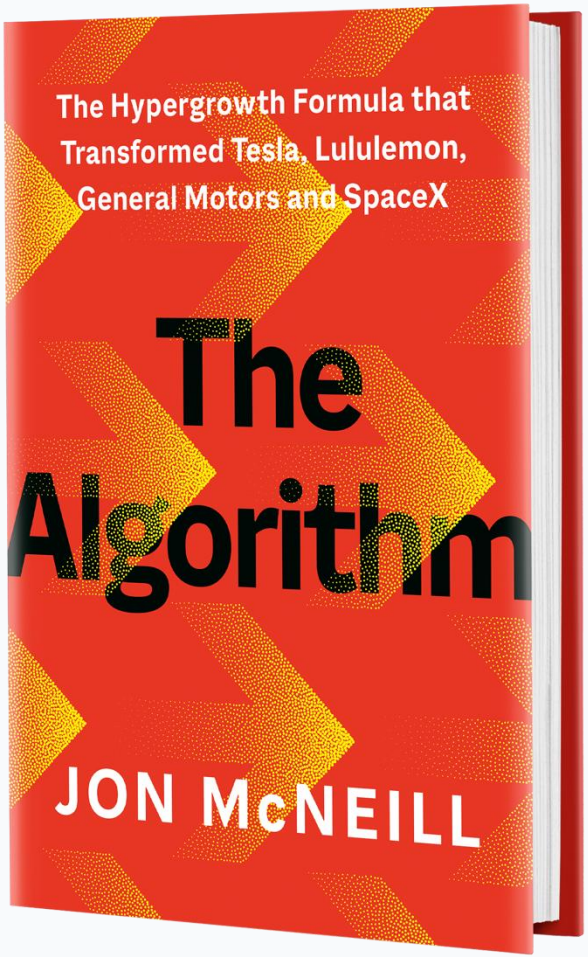


Question Every Step

Then

Simplify & Delete





> *The goal of the simplification step is to get rid of almost all the steps in the current process.*
>
> Jon McNeill

Automating a Subtask

Part 2: The 7Ps

7 Ps Framework

01

Purpose

Goal, Description

02

Please

Prompt, Direction

03

Process

Trigger, Actions

04

Platforms

Tools, Permissions

05

People

Human-in-the-loop

06

OutPut

Description, Format, Location

07

Performance

KPI, Benchmark, Target



1. Purpose

Goal & Description

What needs to be done?

Why?

What’s the outcome?



2. Please

Prompt & Direction

What is the prompt?

What details need to be provided?


Kiss
the Al
Herb Chicken Pasta



3. Process

Triggers & Actions

What are the steps?

What logic is required?

What should I consider?



4. Platforms

Tools & Permissions

What tech is required?

How is the tech used?



5. People

Human-in-the-Loop

Where is the human involved?

Don’t remove human steps because you can.



6. OutPuts

Description,
Format, Location

What outputs are generated?

In what format?

Where are they stored?

Outputs should meet users where they live.



7. Performance

KPIs, Benchmarks, Targets

What metrics matter?

What's the goal?

PURPOSE

The goal of this subtask is to research local trades in a geographic area, pull contact details from their websites, populate the information in a Google Sheet, and then prep it for upload into HubSpot.

PROCESS

1. Do a local Google business search for trades in a city.
    a. **Platform**: Google Local Search API to query and return all found businesses including name and website address.

2. Review the website for address, phone, and email. Specifically look in the header, footer or on the contact us page. If there are multiple cities included on the site, only return the city being searched. If there is no website, skip it.
    a. Do not include PO Boxes
    b. Most sites will list address and phone, but may not list email

3. Search the navigation for an "About Us" or "Team" page. We are looking for the person who owns the company or who is in charge of maintaining the fleets.
    a. Look for job titles like "Operations" or "Fleet"

4. Add the found information for each company to the Local Trades Google Sheet. Create a new tab and name it after the industry.
    a. **OutPut**: Google Sheets - Local Trades Google Sheet > {Industry} tab. Include the following columns—Company name, website, address, city, state, zip code, phone, email, contacts of interest

5. Review the identified companies to ensure alignment and accuracy
    a. **People** This is a Human Task -- The user must confirm all companies were reviewed before moving on

6. Run identified emails through Neverbounce
    a. **Platform**: Neverbounce email verification - Send emails for verification and receive status
    b. **Output**: Add the Neverbounce result back to the sheet in an Email Verification column

.....

12. Draft personalized email sequences using the **Cold Industry Outreach** template. Customize the email to the company and industry. Save the drafts to a Google Doc for review and editing.
    a. **Platform**: Google Docs - Create a new doc and edit it.
    b. **Output**: After creating the Google Doc add the doc's weblink directly to the Google Sheet in a column for that row.

PERFORMANCE

Metrics

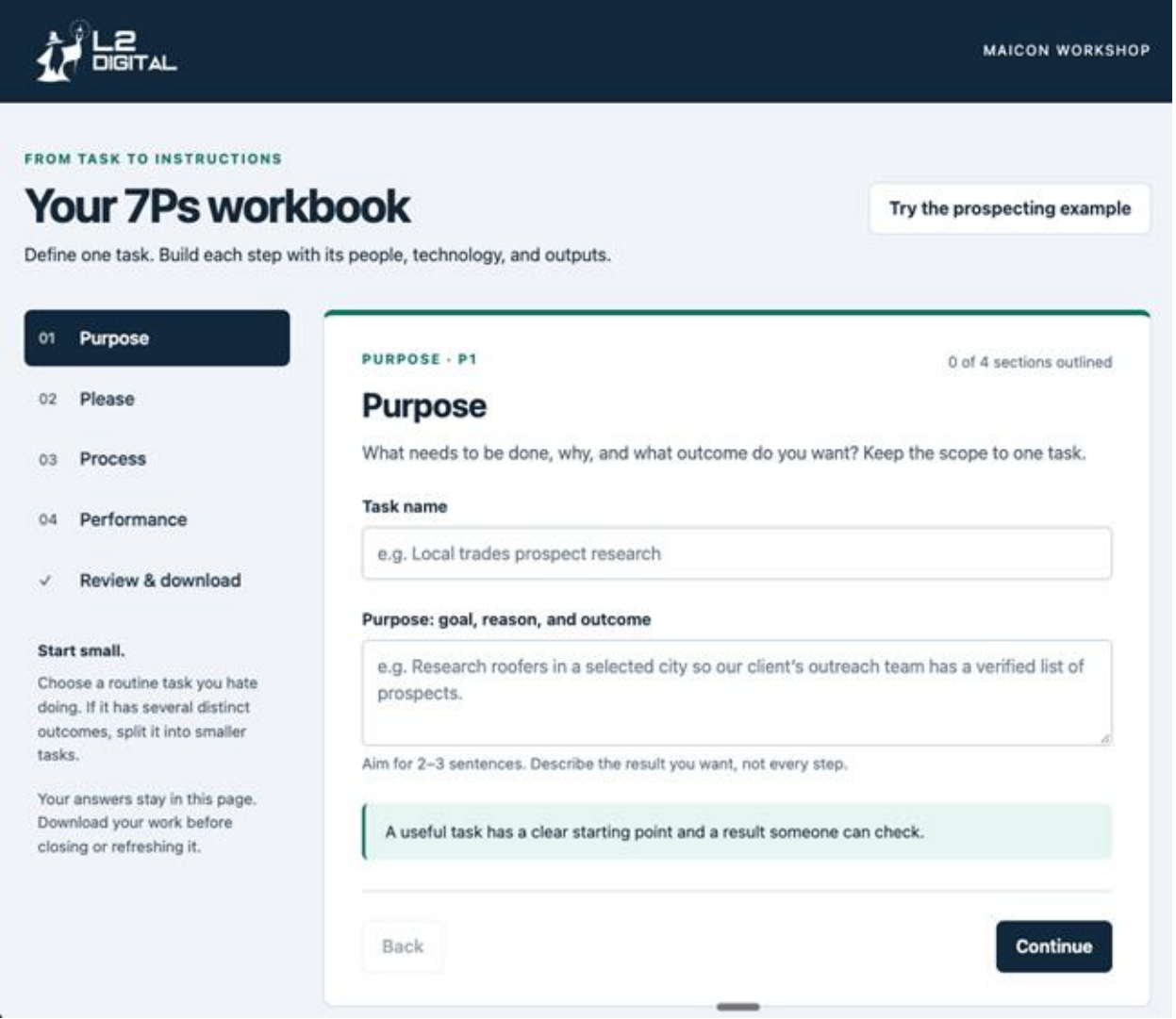
- New companies identified
- Time to complete the research

Goals

- Go from 100 new prospects a month to 1,000
- Cut research time from 6 hours to 1

PLEASE

Run the cold lead industry research and target plumbers in Cleveland, Ohio. Make sure **industry**, **city** and **state** are included in the request. If not, ask for it from the user before starting.



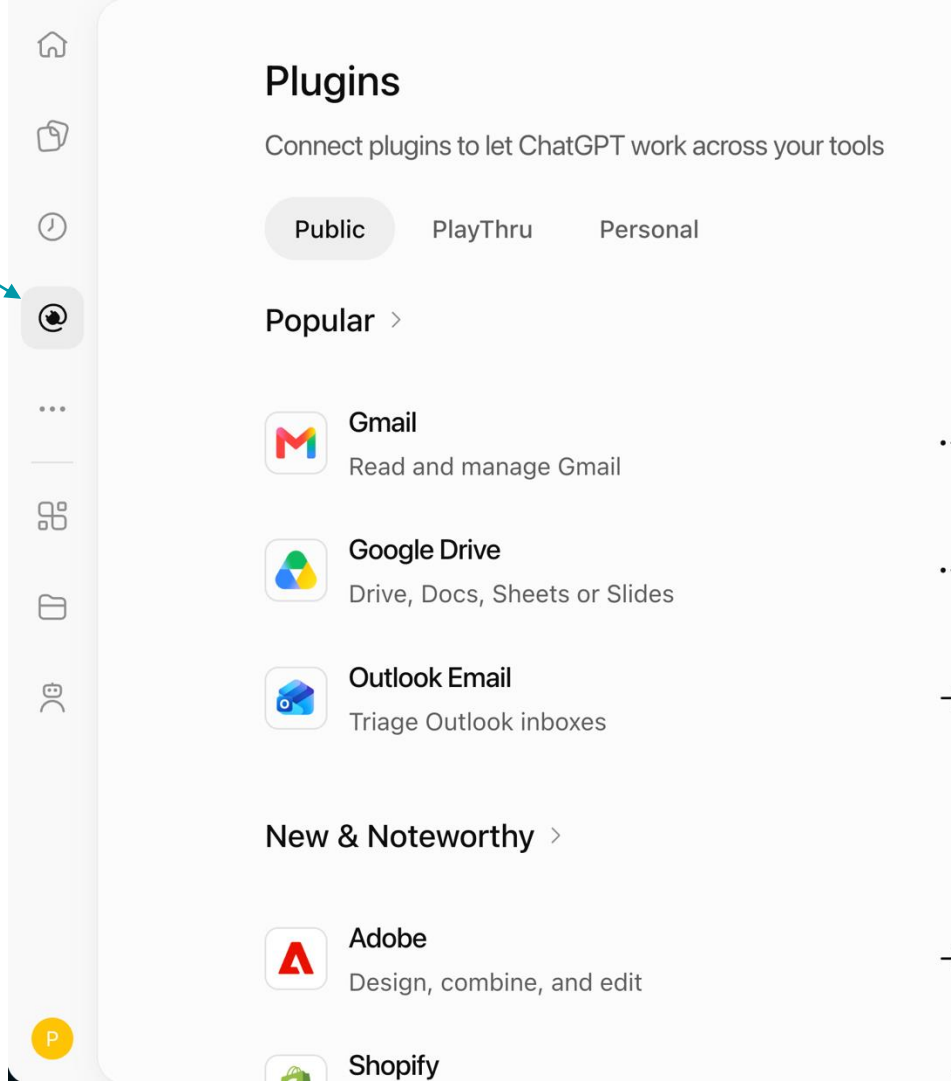
cutt.ly/7ps-tool

Build

Let AI Do the Work



Plugins


Plugins
Connect plugins to let ChatGPT work across your tools
Public
PlayThru
Personal
Popular
Gmail
Read and manage Gmail
Google Drive
Drive, Docs, Sheets or Slides
Outlook Email
Triage Outlook inboxes
New & Noteworthy
Adobe
Design, combine, and edit
Shopify


I know kung fu.

Plugins

Use skills

review-support-emails

Review the latest PlayThru customer support emails from support@golfplaythru.com, categorize requests, consult the bundled common questions and support article directory, and post grounded reply drafts to Slack tagging Keith for review and manual sending. Use for PlayThru support inbox...

Read more

Use this skill

Instructions

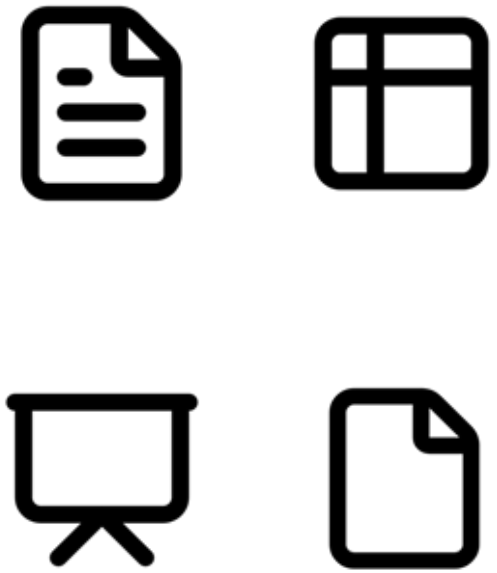
Read `references/configuration.json` for the verified mailbox, reviewer, channel and knowledge provenance. Use the connected Gmail, Slack and Google Drive plugins. Resolve current account metadata by exact email/profile ID; never treat a stored profile ID as a link ID. Do not use ai@golfplaythru.com as the support mailbox. If a required integration cannot be accessed, report the blocker without claiming completion.

Review the inbox

1. Interpret an invocation of this workflow as authorization to read support mail, draft replies and post review packets and run-status messages to #support-replies (channel `C0C4GKC1YDU`). Every Slack message from this workflow, including draft packets, split packet replies, revisions, no-email notices, summaries and blocker/error notices, must go to that channel or a thread within it. Never use another channel or a direct message. If the configured channel is inaccessible or its identity cannot be verified, report the blocker in chat without choosing an alternative destination. For an explicit preview-only request, show packets in chat without posting. Do not send email, create Gmail drafts, mark read, archive, label, change account settings, or edit knowledge sources unless separately instructed.
2. Search the support account for recent incoming mail using `-in:spam -in:trash -in:sent -in:drafts newer_than:7d`. Start with up to 20 newest messages and paginate when the requested scope requires it. Treat 7 days and 20 messages as a default batch, not an exhaustive review of the whole inbox. Search older mail when requested. Do not rely on unread status for deduplication. Include forwarded or aliased incoming requests after reading them; do not require an exact To match.
3. Group by Gmail thread ID and read complete threads before drafting. Identify the latest incoming message, original sender, actual reply address, prior support responses, event details, requests, deadlines and attachments. Read relevant attachments when accessible. Do not assume a subject or snippet is enough. Skip spam, delivery failures, newsletters and automated notices without a customer support request. Skip threads already answered by support unless a later customer message needs a response.

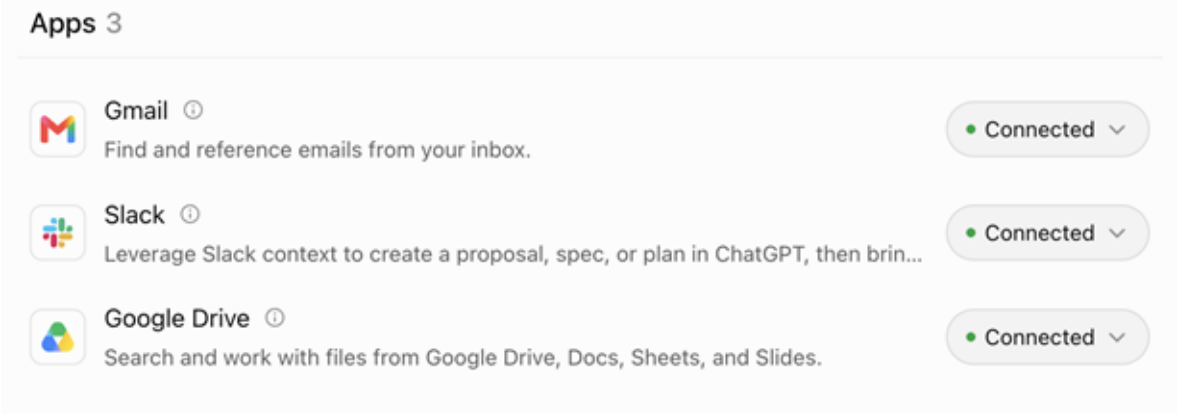
Plugins

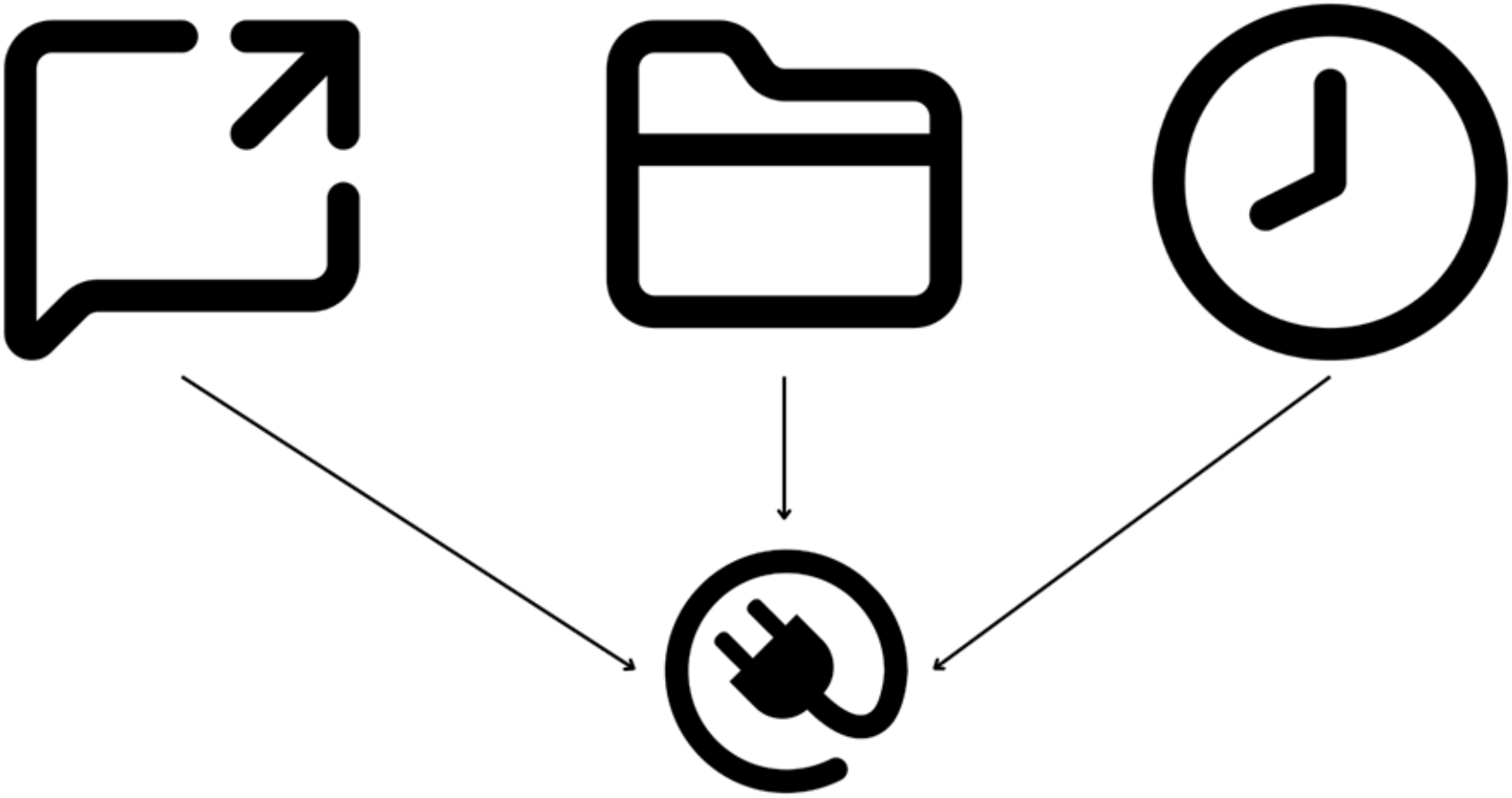
Reference files



Plugins

Tools





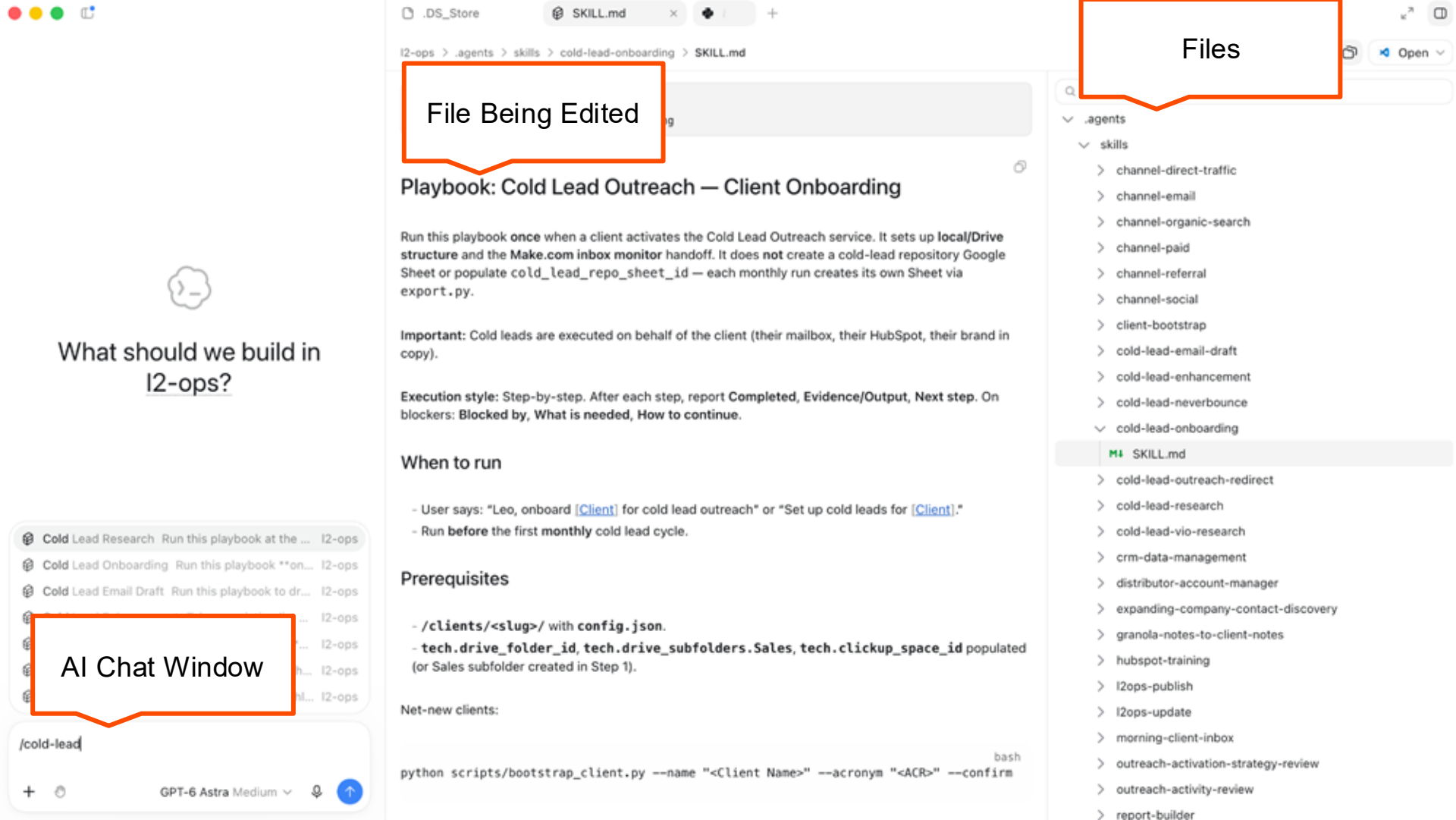

L2-Ops



cutt.ly/ai-native

Download the AI Agent Starter File


You've used ~3× more tokens than The Lord of the Rings.
CURSOR
Claude
Code
OpenAI
Codex
Local
L2-Ops
Describe a task or ask a question
Auto
Opus 5
High


.DS_Store
SKILL.md
l2-ops > .agents > skills > cold-lead-onboarding > SKILL.md
Open
Files
File Being Edited
What should we build in l2-ops?
Cold Lead Research Run this playbook at the ... l2-ops
Cold Lead Onboarding Run this playbook **on... l2-ops
Cold Lead Email Draft Run this playbook to dr... l2-ops
AI Chat Window
/cold-lead
GPT-6 Astra Medium
Playbook: Cold Lead Outreach — Client Onboarding
Run this playbook once when a client activates the Cold Lead Outreach service. It sets up local/Drive structure and the Make.com inbox monitor handoff. It does not create a cold-lead repository Google Sheet or populate cold_lead_repo_sheet_id — each monthly run creates its own Sheet via export.py.
Important: Cold leads are executed on behalf of the client (their mailbox, their HubSpot, their brand in copy).
Execution style: Step-by-step. After each step, report Completed, Evidence/Output, Next step. On blockers: Blocked by, What is needed, How to continue.
When to run
- User says: "Leo, onboard [Client] for cold lead outreach" or "Set up cold leads for [Client]."
- Run before the first monthly cold lead cycle.
Prerequisites
- /clients/<slug>/ with config.json.
- tech.drive_folder_id, tech.drive_subfolders.Sales, tech.clickup_space_id populated (or Sales subfolder created in Step 1).
Net-new clients:
bash
python scripts/bootstrap_client.py --name "<Client Name>" --acronym "<ACR>" --confirm
.agents
skills
channel-direct-traffic
channel-email
channel-organic-search
channel-paid
channel-referral
channel-social
client-bootstrap
cold-lead-email-draft
cold-lead-enhancement
cold-lead-neverbounce
cold-lead-onboarding
SKILL.md
cold-lead-outreach-redirect
cold-lead-research
cold-lead-vio-research
crm-data-management
distributor-account-manager
expanding-company-contact-discovery
granola-notes-to-client-notes
hubspot-training
l2ops-publish
l2ops-update
morning-client-inbox
outreach-activation-strategy-review
outreach-activity-review
report-builder



What should we work on in L2-Ops?

L2-Ops

Read START-HERE.md and start setup.

GPT-6 Astra Medium

L2-Ops > START-HERE.md

View source

Open

START HERE

What this is: instructions for an AI assistant to set up a business operating system on your computer, then help you build your first AI-orchestrated automation.

What to do with it:

1. Create a folder on your desktop. Name it after your company, like `Acme-Ops`.
2. Put this file inside that folder.
3. Open the folder in Claude Code, Codex, or Cursor.
4. Type: **"Read START-HERE.md and walk me through it."**

That's it. The assistant takes it from there. It will ask you questions before it builds anything.

Expect the setup to take 15–20 minutes. Building your first automation takes longer, and that's the point.

Filter files...

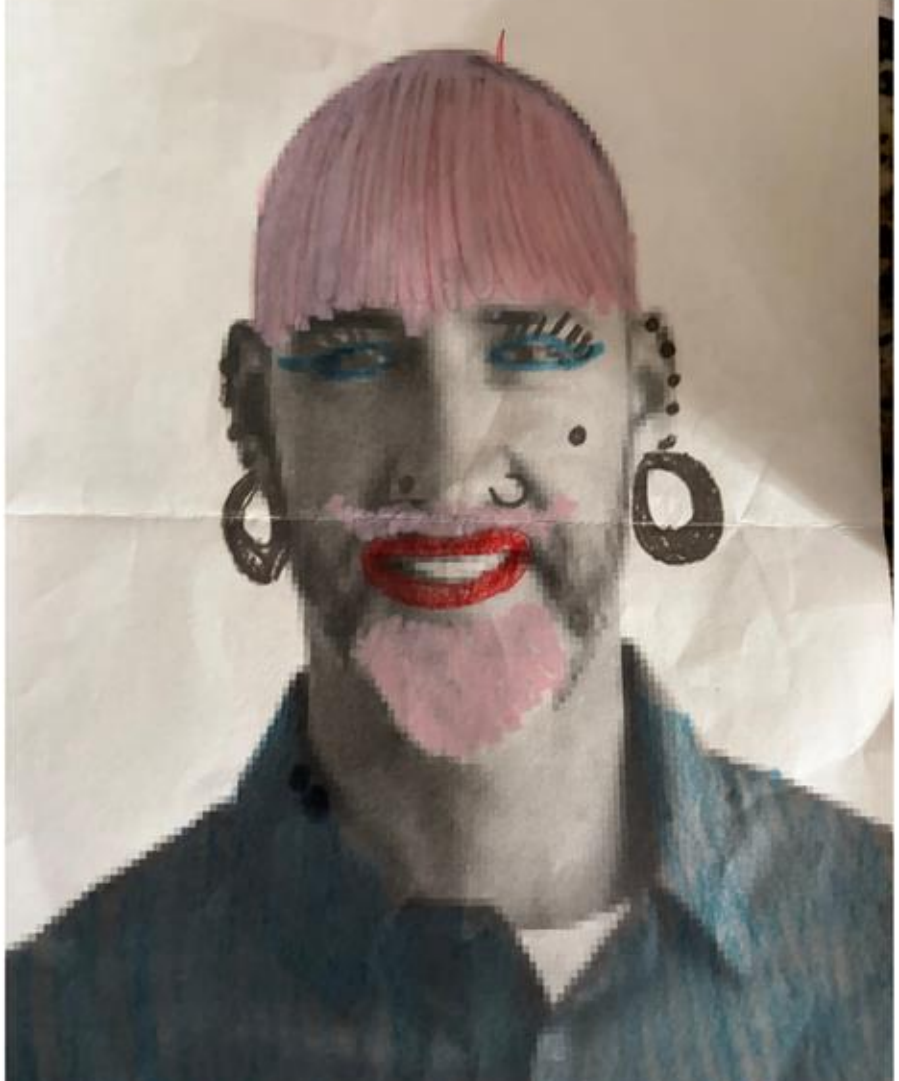
- .agents
- Resources
- Tools
- .DS_Store
- 7Ps-Cold Outreach.md
- START-HERE.md

Crawl Walk Run ~~Sprint~~

Rollout



What I Taught My Kids



What They Created

Crawl



Review every output closely and provide feedback every time (good and bad).

Graduate When: Outputs are solid at least 5 times in a row.


Kiss the Al
+ More garlic!
Perfect as is!

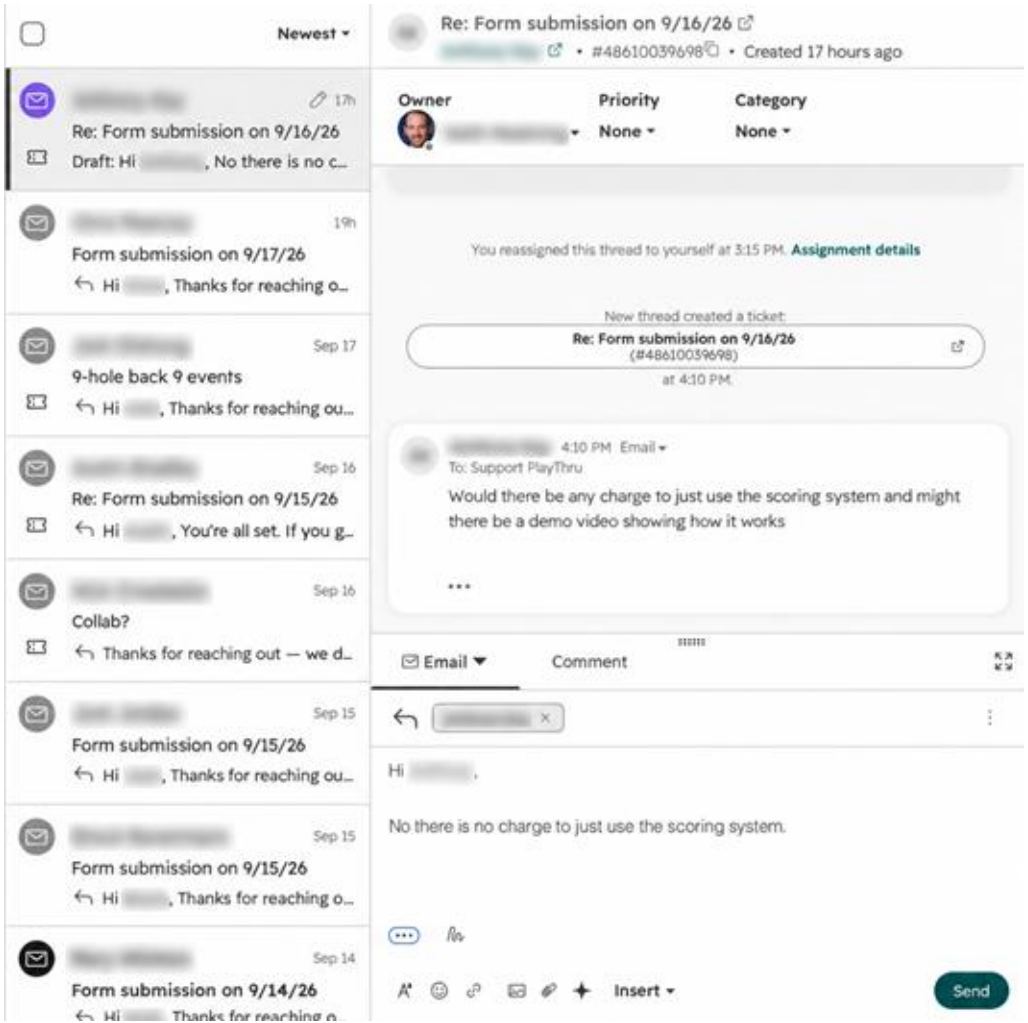
Processes will
slow down initially

Walk



Review every output but provide feedback only for issues.

Graduate When: Outputs consistently require no feedback.



/support-reply

Worked for 44s

One new follow-up to draft. The other five open threads already have a support reply as the latest message, so I'm skipping those.

Thread 11197752610 — [redacted] scoring-only cost + demo

Issue: Follow-up after Keith confirmed he can skip registration. [redacted] ants to know if live scoring for a one-day 2-player scramble costs anything, and whether there's a demo video.

Sources: `35-whats-included-in-the-free-plan-vs-paid-upgrades.md`, `09-how-do-i-set-up-a-scramble-outing.md`, `01-how-do-i-create-a-new-event-and-what-are-the-setup-steps.md` · faq-013 (Upgrade tab / scramble Teams tab). Demo video is the empty-dashboard YouTube embed, not in the FAQ.

Draft reply:

Hi [redacted]

Thanks for reaching out to PlayThru support. I'm happy to help.

There's no charge to use PlayThru as live scoring for your one-day 2-player scramble. Event setup, scramble format, the live scorecard, and the leaderboard are all on the free plan.

If you later want extras like skins, hole competitions, a custom logo, or an ad-free scorecard, those are optional upgrades in the Upgrade tab — you don't need them for a standard scramble.

Here's a short setup walkthrough: https://www.youtube.com/watch?v=bva4Z4qcCLQ

And the scramble how-to: https://www.golfplaythru.com/support/how-to-set-up-a-scramble-golf-outing

In short: set Game Format to Scramble, add each pair as a team name, then share the scorecard link/QR from the Scorecard tab. One phone per team enters a single score each hole.

You can also create a free test event and click through it before tournament day.

Thanks! Keith

Confidence: high on pricing (free plan covers core live scoring + scramble). Medium on the YouTube link — it's the dashboard demo, not documented in the FAQ.

Ask Keith if: you'd rather not share that YouTube URL, or you'd rather keep this even shorter and skip the scramble how-to.

2h ago

This is good. I do want to share the youtube videos, but we need to hold on that for the moment until new ones are created. In other words, no youtube videos until I say so.

Worked for 31s

1 File Undo Keep Review

Plan, Build, / for skills, @ for context

Agent Cursor Grok 4.6 High Fast

Run



Review outputs sporadically, not necessarily every time.

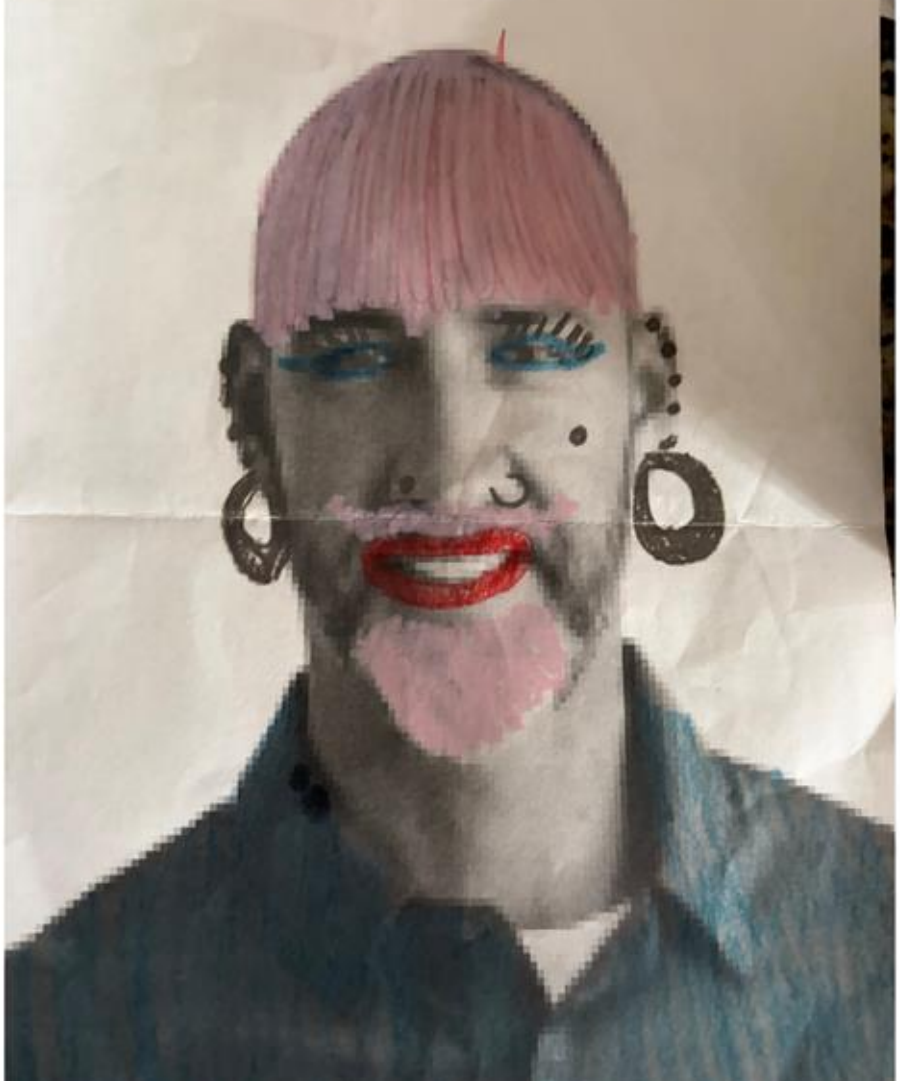
Graduate When: You don’t. Always check sporadically.

Don’t Sprint



Don’t let an AI orchestration agent just run unsupervised, especially if they have access to:

- Any public connections
- Any permissions above “Read Only”
- Anything that may result in you looking like this …



Organize

How to Keep It All Straight

- ➔ blog-content-draft
- ➔ blog-to-social-drafts
- ➔ channel-direct-traffic
- ➔ channel-email
- ➔ channel-paid
- ➔ channel-referral
- ➔ channel-social
- ➔ client-bootstrap
- ➔ cold-lead-email-draft
- ➔ cold-lead-enhancement
- ➔ cold-lead-neverbounce
- ➔ cold-lead-onboarding
- ➔ cold-lead-outreach-redirect
- ➔ cold-lead-research
- ➔ cold-lead-vio-research
- ➔ crm-data-management
- ➔ distributor-account-manager
- ➔ expanding-company-discovery
- ➔ granola-notes-to-client-notes
- ➔ hubspot-training
- ➔ l2ops-publish
- ➔ l2ops-update
- ➔ morning-client-inbox
- ➔ monthly-client-clickup-setup
- ➔ outreach-activation-strategy-review
- ➔ outreach-activity-review
- ➔ influencer-recap
- ➔ report-builder
- ➔ tbc-eligible-sheet
- ➔ tbc-monthly
- ➔ tbc-onboarding
- ➔ weekly-distrib-perform-report
- ➔ weekly-l2-traffic-report
- ➔ weekly-client-project-activity

START Task Creation Automation Run

Task Creation Automation Run

Seed the whole month of ClickUp tasks in one pass — start-of-month, second-week, every weekly Monday, and quarterly reviews in quarter months — each with the right due date.

`/distributor-account-manager`

WEEK 1

Cold Lead Research

Build the month's cold lead list, then run the two-agent pull-and-validate process and hand the Google Sheet to Services for review.

`/cold-lead-research` `/cold-lead-vio-research`

Past Cold Lead Re-engagement

Re-activate prior cold leads who did not convert — refresh the messaging and re-enroll a targeted cohort through the client's cold outreach mailbox.

`Manual / on-demand`

WEEK 2

Expanding Company Contact Discovery (PP ONLY)

PERMIT PLACE ONLY.

`/expanding-company-contact-discovery`

Customer Newsletter

A recurring newsletter to the client's customer base.

`Manual / on-demand`

WEEK 3

Past Customer TBC Campaign

Pull the TBC: Customer Eligible list from HubSpot and export it to a Google Sheet in the client's Sales Drive folder for sales-rep review.

ONGOING

Runs continuously alongside the monthly flow.

- Inbox Monitoring
  `/morning-client-inbox`
- Project Recaps
  `manual`
- HubSpot Support
  `manual`
- Weekly No Touch Monitoring
  `/outreach-activity-review`
- Bi-Weekly Manager Meeting
  `/weekly-manager-meeting`

‹ Monthly board

Cold Lead Research

Week 1 · Monthly | AI enabled: Partial

Build the month's cold lead list, then run the two-agent pull-and-validate process and hand the Google Sheet to Services for review. Two entry points: a Places-driven discovery build, or a pre-built VIO list you provide. Use one or the other depending on lead source availability.

INVOKE THIS SERVICE

`/cold-lead-research` Standard monthly build

List building via Google Local Business Search, then the two-agent pull + validation into the monthly Google Sheet (the system of record).

CONTEXT TO PROVIDE

- **Client slug** (e.g. pacific-truck-colors).
- **Target industry** — e.g. Electricians, HVAC.
- **Geographic region** — e.g. Portland, OR.
- **Discovery limit** — default 300 unless agreed otherwise.

EXAMPLE PROMPT

```
Leo, run cold leads for {{Client}} · Leo, run VIO cold lead research for {{Client}} (with Sheet ID)
```

PROCESS

AI Manual

1. Confirm scope with KM — target industry, geographic region, and discovery limit (default 300). For VIO, confirm the Sheet ID + tab/range.
2. Type in the /cold-lead-research or /cold-lead-vio-research command into Cursor with required context.
3. Build the list (Google Local Business Search) or import the VIO sheet with Places lookup + strict intake.
4. Agent 1: Rendered crawl + LLM extraction, saving crawl artifacts per site.
5. Agent 2: Validate extracted contacts against saved artifacts; write validated records to the monthly Google Sheet.
6. Pre-handoff QC, then update the monthly Cold Lead Research ClickUp task → In Progress with the Sheet link.
7. Sort the cleaned records sheet by domain name and remove any duplicates. Then do the same using Street Address and then Company Name.
8. Review the city and state columns for alignment with the targeted geographic area.
9. Add a column next to the company name column and use the =propert() function to remove all caps names. Be sure to go back through and make sure acronym names (MGM Electric) are changed back to all caps where needed.

“Build me an HTML operating manual showing a menu of all skills. When clicked, a skill page should detail the purpose, please/prompt, and process steps, labeling which are human and which are AI.”

Where to Start



cutt.ly/ai-native

1. Run the 7Ps tool on a subtask
2. Download the START-HERE.md file and an AI Coding tool.
3. Ask the AI coding tool to run START-HERE.

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MAICON FORWARD

KEITH MOEHRING

CEO

L2 Digital

THANK YOU! WE APPRECIATE YOUR SESSION FEEDBACK.