

Tutorial 60 Worksheet

My AI Offboarding & Referral Builder

Step 1: Define Your Target Deliverable

- * What is the primary output or service you deliver to clients?
 - * My Core Service:
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Step 2: Define Your Referral Incentive

- What small perk or gesture can you offer for client referrals? (e.g., 10% off next project, free 15-minute consultation, gift card)
 - My Referral Perk:
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Step 3: Test Your Feedback Prompt

- * *Fill in the blanks and submit this prompt to your AI agent:*
"Act as my Offboarding Agent. Draft a 3-paragraph closeout email for a client who just completed [Insert Core Service]. Thank them for their trust, include my 3-question feedback request, and offer [Insert Referral Perk] if they refer a friend."

Step 4: Action & Tracking

- *Where will you store and display your collected reviews?*
- * *[] On my main website homepage / offer page*
- * *[] Inside a PDF portfolio / proposal document*
- * *[] On my social media profile or local business page*