

AI Bootcamp Week 2 Follow-Up Resource Guide

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Replay

- **Session:** AI Bootcamp Week 2 - Workflow Readiness + Stack Audit
- **Recording:** <https://fathom.video/share/Vfa8sazKxs6xeiJGzU7aL4X3A6TxJWNb>
- **Focus:** building the company brain and getting one workflow ready for automation.

What We Covered

Week 1 introduced the four pieces of an AI workflow: **Brain, Body, Context, and Prompt**.

Week 2 focused on **Context and Prompt**.

The main idea was simple:

Before an agent can reliably do work for your business, it needs a clear place to find the truth of the business.

That is why we built an Obsidian company brain.

Obsidian is not the automation tool by itself. It is the organized memory layer your agent can read and update. The actual work may later run in Claude Cowork, OpenClaw, ChatGPT, another agent platform, or a custom scheduled workflow. The point of Week 2 was to keep the business context portable so you are not trapped inside one tool.

Why Obsidian Matters

Obsidian is a local folder of Markdown files with a graph view layered on top.

That matters because agents can work with files and folders. They can read notes, create new notes, follow wiki links, and update structured context without needing everything to live inside one SaaS product.

The goal is not to make you manually write documentation all day.

The goal is to let the agent:

- read a real source document;

- extract the useful context;
- create clean notes;
- connect people, meetings, projects, workflows, systems, outputs, and receipts;
- leave the result somewhere you can review.

In other words: **Obsidian becomes the company brain the agent can use later.**

The Live Demo

During the session, we created a fresh Obsidian vault and pointed Claude Cowork at that folder.

Then we used the Week 2 prompt pack in this order:

1. Prompt 1 - Create The Company Brain Structure

- Creates the folder structure.
- Creates the main README.md .
- Creates a README.md inside every folder.
- Gives the future agent instructions for what belongs in each folder.

2. Prompt 2 - Ingest The Example Meeting Artifact

- Uses the fake BrightPath Wellness Fathom-style meeting.
- Creates connected notes for the meeting, people, company, projects, workflows, source systems, outputs, and receipts.
- Uses Obsidian wiki links so the graph becomes useful.

3. Prompt 3 - Archive Example Data But Keep The Structure

- Moves fake example notes into 99-Archive/Example-Training-Data/ .
- Keeps the folder structure and README instructions.
- Gives you a clean vault you can use for your real workflow.

4. Prompt 4 - Interview Me To Extract My Real Workflow

- Claude Cowork interviews you one section at a time.
- You do not need to fill out a giant form all at once.
- The goal is to turn messy process knowledge into a real workflow note.

5. Prompt 5 - Help Me Gather Context For My Real Workflow

- After the workflow is selected, Claude helps you identify what context is missing.
- This becomes your homework checklist before Week 3.

What The README Files Are For

The README files are not decoration.

They are instructions for the agent.

Each folder README tells Claude Cowork, OpenClaw, or another agent:

- what belongs in that folder;
- what does not belong there;
- how notes should be named;
- which sections each note should include;
- how wiki links should be used;
- what to do when information is missing;
- when to add an open question instead of guessing.

This matters because vague folders create vague agent behavior.

If the agent knows the rules before it writes, the output gets more consistent.

Your Homework Before Week 3

The goal for this week is not to have a perfect automation.

The goal is to come back with one workflow documented well enough that we can start connecting the tools next week.

1. Review The Demo Vault

Open the Obsidian vault you created during the session.

Look through the notes Claude created from the fake BrightPath Wellness example:

- meeting note;
- people notes;
- company note;
- project notes;
- workflow notes;
- source-system notes;
- output and receipt notes;
- graph connections.

You are looking for structure, not memorizing the fake example.

Ask:

- What did Claude extract?
- What folder did it put each thing in?
- Which wiki links are useful?
- What would I want changed for my business?
- What would a good meeting-ingestion output look like for me?

2. Archive The Example Data

If you want to keep the vault structure from the demo, use **Prompt 3**.

Prompt 3 will archive the fake BrightPath data and keep the folder structure plus README instructions.

If you would rather start fresh, create a new Obsidian vault and rerun **Prompt 1**.

Either path is fine. The important thing is that you have a clean company-brain structure for your real workflow.

3. Pick One Real Workflow

Do not try to automate your whole business.

Pick one repeatable workflow.

A good candidate:

- happens more than once;
- has a clear trigger;
- uses real inputs;
- touches at least one system or tool;
- has a human judgment point;
- creates an output;
- can be reviewed safely;
- would save time if it were documented and eventually scheduled.

Examples from the cohort:

- Estoria weekly operating brief.
- Contractor or maintenance follow-up.
- Cleaning, restock, or QC coordination.
- Invested Escapes new-agent onboarding.
- Lead intake to proposal preparation.
- Guest-message triage.
- Weekly operating reminders.

4. Use Prompt 4 In Claude Cowork

Use **Prompt 4 - Interview Me To Extract My Real Workflow**.

Paste it into the same Claude Cowork thread if you are continuing from the live session.

When it asks for your workflow, name the workflow you selected.

Example:

```
My workflow is: weekly contractor and maintenance follow-up for my short-term rental properties.
```

Let Claude interview you one section at a time.

Do not worry if your answers are messy. Messy is useful. The point is to get the process out of your head and into a structure the agent can work with.

5. Use Prompt 5 To Gather Context

After Prompt 4 creates the workflow note, use **Prompt 5 - Help Me Gather Context For My Real Workflow**.

Prompt 5 should help you identify:

- what source documents are needed;
- what systems the workflow touches;
- what examples would train the agent;
- what output format you want;
- where the agent should stop;
- what proof would show the work happened;
- what is still missing.

6. Move Or Summarize The Context Into Obsidian

Start gathering the context your agent will need.

If the information lives in a CRM, export or summarize the relevant people, companies, deals, or leads.

If the information lives in Google Drive, bring in the SOPs, checklists, reports, templates, or examples.

If the information lives in Monday.com, Slack, email, Hospitable, a PMS, or another tool, document what that tool stores and what the workflow needs from it.

If the information lives in your head, record a walkthrough and transcribe it.

Good walkthrough prompt:

```
Start with the trigger. Walk through what happens now. Say where the information comes from. Say what systems you check. Say what you are thinking at each step. Say where judgment happens. Say where the agent should stop. Say what good output looks like. Say what proof would show the work was done.
```

What To Bring To Week 3

Bring your context with you.

By the next session, try to have:

- one selected workflow;
- a workflow note in Obsidian;
- the trigger that starts the workflow;
- the current steps;

- the source systems it touches;
- the human judgment points;
- the stop signs;
- the expected output;
- one good example of the output if you have one;
- at least one messy or ambiguous case if you have one;
- proof or receipt ideas;
- a list of what is still missing.

You do not need perfection.

You need enough context that next week we can start asking:

- What should the agent read?
- What should it produce?
- What tools does it need access to?
- What should run on a schedule?
- What should stay human-reviewed?
- Where does the output go?
- How do we verify the work happened?

Week 3 Preview

Week 2 built the brain.

Week 3 starts giving the workflow a body.

That means we will start looking at how to make the documented workflow actually run:

- in Claude Cowork where appropriate;
- with schedules where the platform supports it;
- with OpenClaw for more flexible execution;
- with cron jobs or recurring schedules;
- locally on your computer vs. hosted on a VPS;
- with tool connections, source-system access, and receipts.

You may not finish the full build by the end of Week 3. That is okay.

The goal is to understand the path and begin testing. Week 4 is where we polish the workflow so each person has one end-to-end example they can use as the model for future workflows.

Helpful Resources

- **Fathom:** <https://fathom.video/>

- Free AI meeting note-taker. Useful for capturing calls and turning them into source material for the company brain.
- **Obsidian:** <https://obsidian.md/download>
 - The company-brain layer we used in the session.
- **Claude download:** <https://claude.com/download>
 - Use Claude Cowork / desktop workflows when you want Claude to work with files and folders.
- **Wispr Flow:** <https://wisprflow.ai/>
 - Free voice-to-text dictation app. Useful when the workflow is still in your head and you need to speak it out first.
- **Whisper Notes:** <https://whispernotes.app/>
 - Offline Whisper-based transcription for iPhone and Mac.
- **OpenClaw:** <https://github.com/openclaw/openclaw>
 - Open-source agent runtime we will talk about more in Week 3.
- **Artificial Analysis:** <https://artificialanalysis.ai/evaluations/artificial-analysis-intelligence-index>
 - Model comparison resource for understanding intelligence, cost, and capability tradeoffs.

The Point

The work this week is the foundation.

You are making the business legible to future AI.

Once the workflow is documented and the context is organized, the next question becomes much easier:

How do we make this run every time, without you manually carrying the work from tool to tool?

That is what we start next week.