

The 5 layers



Every assistant has the same five layers. Put each thing in the right layer and it stops forgetting.

LAYER	WHERE IT GOES	LIFE MANAGER	BUSINESS MANAGER	LIKE A NEW EMPLOYEE'S
1 Instructions Who it is	The Project's instructions box	"You're my assistant and coach. Keep me on track."	"You answer our customers. Warm and short."	Job description
2 Knowledge What it knows	Files you upload to the Project	My goals, routines, people who matter	Prices, FAQ, three great past replies	Staff handbook
3 Memory Learns as it goes	Builds as you chat (check memory is on in settings)	"I train Tuesdays and Thursdays."	"This client prefers WhatsApp."	Learning on the job
4 Skills How you do things	Saved skills, or a Routines section in your instructions	"Plan my week the way I like it."	"Write a quote the way we always do."	Training manual
5 Connectors Keys to the office	Settings › Connectors (Gmail, Calendar, Drive)	"What's on tomorrow?"	"Draft replies to today's enquiries."	Office keys

Wrong layer: it forgets. Right layer: it just works.

Something it must always know goes in Instructions or Knowledge. A routine you repeat becomes a Skill. Something it learned in chat lives in Memory, which you can't fully control.

The prompt formula



Role + Context + Task + Format + Rules. You don't need all five every time, but a vague answer usually means one is missing.

Role

WHO IT IS

You're my weekly planner and coach.

Context

WHAT IT NEEDS TO KNOW

I work 9 to 5, gym Tue and Thu, my goal is to launch my course.

Task

ONE CLEAR JOB

Plan my week.

Format

WHAT THE RESULT LOOKS LIKE

Monday to Sunday, one line per day, one screen.

Rules

LIMITS, AND WHEN TO ASK

Don't book anything. If a day looks overloaded, ask me what to move.

LIFE

VAGUE

Help me plan my week.

CLEAR

You're my coach. I work 9 to 5 and train Tuesday and Thursday evenings. My big goal this month is finishing my course outline. Plan my week Monday to Sunday, one line per day, with two 90-minute focus blocks. Don't move my gym sessions. If a day looks too full, ask me what to drop.

It knows who to be, your fixed points, the one goal, the shape of the answer and the limits.

BUSINESS

VAGUE

Write a reply to this customer.

CLEAR

You're the front desk for Casa Azul, two holiday flats in Nerja. Reply to this enquiry [paste]. Use only the prices and FAQ in my knowledge file. Reply in the customer's language, under 120 words, ending with one clear next step. If the answer isn't in my files, write "Let me check and come back to you" and flag it under "Check:".

It can't invent prices, it matches your voice and length, and it tells you what to check.

Quick fixes when the answer is off

Too long

"Five lines max."

Too generic

"Use my About me file."

Made something up

"Only use my files. Say 'I don't know' when it's missing."

Wrong tone

"Warmer, like the examples in my file."

Same mistake twice

Paste the Improve yourself prompt.

Tool picker



The ladder: chat app, then Project, then the Claude app with connectors, then an always-on bot, then an automated fleet. Most people get 80% of the value from the first three rungs.

ChatGPT, Claude or Gemini

Chat apps with Projects (Gems in Gemini): saved instructions, files and memory

USE IT WHEN	Start here. Most people can stay here for months.
GOOD	Free or cheap, zero setup, in your browser and on your phone
WATCH OUT	Waits for you to ask. Connectors usually need a paid plan
COST	Free plans. Paid plans about €20 a month

Claude app and desktop

Claude with skills, Gmail and Calendar connectors and scheduled tasks. Cowork is now part of the Claude app

USE IT WHEN	You want an assistant that does things: daily briefs, files, reports
GOOD	Easiest real agent for non-technical people. Phone and laptop. Reusable skills
WATCH OUT	The best bits are on paid plans. Your computer must be on for local work. Check what it can access
COST	Paid plan for connectors, skills and schedules

Grok Bot (xAI)

Hosted bots, each with its own cloud computer, app logins, memory and scheduled routines

USE IT WHEN	You want always-on bots without running a server
GOOD	No server to look after. Easy first bot. Routines, templates and ready-made guides
WATCH OUT	Teams of bots get complex fast. Check what each login lets it do
COST	Premium \$30 a month (older videos say \$20)

OpenClaw or Hermes

Open-source assistants that live in Telegram or WhatsApp and can message you first

USE IT WHEN	You want a 24/7 assistant in your messaging app, like a family bot
GOOD	Always on, chat-based, very customisable, fully yours
WATCH OUT	Real setup and upkeep. Security is your job. Hosted shortcuts are in Next level
COST	Open source. You pay for hosting and the AI model

Codex (OpenAI)

Builds apps, tools, websites and scripts from plain-English requests

USE IT WHEN	You want to build a tool rather than have a helper
GOOD	Turns ideas into working software
WATCH OUT	Made for building software, not for running your inbox. Check its work
COST	Best with a paid ChatGPT plan

Jev (TypeSafe System One)

A very cheap, very fast decision engine: yes/no, multiple choice and scores

USE IT WHEN	Advanced: your bots make thousands of small decisions
GOOD	Extremely cheap and fast. Consistent answers. A good quality gate
WATCH OUT	Doesn't write text. Developers only. Only worth it at volume
COST	For developers

Prices and features checked 19 Oct 2026. They change often: check before you pay.

Safety rules



- 1 **It drafts, you send.** Emails, posts, bookings and payments always go through you.
- 2 **Start read-only.** Let it read your calendar before it's allowed to draft, and draft before it acts.
- 3 **Use a demo account to learn.** Try connectors with a spare Google account and fake data first.
- 4 **Don't paste other people's private data.** Client lists, health details and passwords stay out until you've checked the data settings.
- 5 **Check before you trust.** Ask for sources. Compare dates, prices and names with the real thing.

What you can paste

Fine

- Your own plans, goals and routines
- Public information
- Drafts you will read before sending
- Your own business FAQ and prices

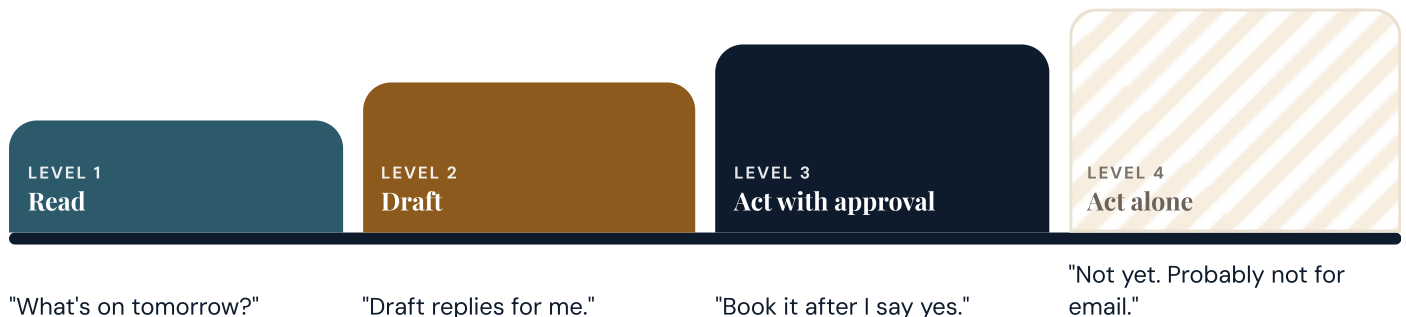
Think first

- Client emails and messages: remove names and numbers
- Business numbers and contracts
- Anything about another person
- Check the tool's data settings first

Never

- Passwords and login codes
- Card numbers and bank details
- ID documents: passport, DNI, NIE numbers
- Other people's health data

The permissions ladder for Gmail and Calendar



GDPR applies to your clients' data. Check the tool's data settings, keep a human checking every draft, and know how to disconnect (Settings › Connectors).