

The AM-OS Playbook

Version: March 2026 | Purpose: Immediate onboarding asset delivered at signup.

This playbook gives every new member a practical starting point for building autonomous business operations.

1) The 5 Business Functions To Automate First (Ranked by ROI)

Rank	Function	Why it pays first	KPI	First automation target
#1	Customer Support Triage	Removes founder interruptions and protects response SLA	Median response time	Escalation routing plus drafted response plus escalation tags
#2	Content Production Pipeline	Sustains top-of-funnel output without founder oversight	Daily standalbeats	Research summary to draft to channel adaptation
#3	Revenue Reporting and Profitability	Improves weekly decision quality and reduces leaks	Weekly net cash	Stripe summary plus variance alerts
#4	Lead Qualification and Outreach	Raises conversation quality and protects pipeline	Qualified leads booked	Lead scoring plus first-touch draft
#5	Onboarding and Fulfillment	Standardizes delivery and lowers churn	Time-to-first-value	Kickoff packet plus milestone reminders

2) The RICE Prompt Framework

- **R - Role:** Define identity, scope, and expertise boundary.
- **I - Instructions:** Give explicit, ordered actions and constraints.
- **C - Context:** Provide business rules, audience, and tool context.
- **E - Examples:** Show target output format and quality bar.

RICE Template

R: You are the Reporting Agent for a bootstrapped service business.

I: Every Monday at 8:00 AM, summarize last week's revenue, refunds, top channels, and anomalies over 12%.

C: Use Stripe exports plus CRM report. Keep response under 250 words.

E: Format as KPI Snapshot, Trend Flags, and Recommended Actions.

3) Agent Role Templates

Support Agent

- Mission: Resolve common support requests quickly and escalate risky cases.
- Inputs: Customer message, order ID, policy doc, order history.
- Process: classify -> draft -> apply policy -> escalate if needed.
- Output: Reply draft, confidence score, escalation flag.
- Escalation triggers: Legal threat, large refund request, repeated billing failure.

Content Agent

- Mission: Convert weekly research into publish-ready assets.
- Inputs: Source notes, offer angle, audience profile, banned claims list.
- Process: angle map -> draft -> channel adaptation -> QA pass.
- Output: One long-form draft plus three short-form variants plus CTA options.

- Escalation trigger: Any claim cannot be verified.

Reporting Agent

- Mission: Produce weekly executive summary across revenue and operations.
- Inputs: Stripe data, traffic data, support volume, KPI targets.
- Process: aggregate -> compare -> flag variance -> recommend actions.
- Output: One-page KPI summary with owner-assigned next steps.
- Escalation trigger: Data mismatch above tolerance.

4) Weekly Review Cadence Template (60 minutes)

Minutes	Segment	Prompt to run	Deliverable
0-10	KPI Snapshot	What moved most this week and why?	Top 3 signal changes
10-25	Failure and Drift Review	Where did agents fail policy, tone, or timing?	Severity-ranked issue list
25-40	Prompt and Workflow Updates	Which one SOP upgrade gives highest return next week?	One approved change ticket
40-55	Execution Commitments	What three actions must ship before next review?	Owner plus due date assignment
55-60	Risk Check	Any unresolved risk that can block revenue or reputation?	Escalation decision

5) QA Audit Checklist

- Prompt Integrity: RICE fields complete, hard constraints explicit, output schema deterministic.
- Workflow Reliability: retries and fallback paths exist, critical events logged, escalation routed to human.
- Business Safety: no high-value refund autonomy without approval, outbound messages follow suppression rules.
- Launch-Day Go/No-Go: pass rate $\geq 95\%$ in staging, one end-to-end dry run, rollback plan tested.

Use this playbook as your baseline. Update monthly as your stack and customer workflows evolve.