



WORKSHOP 2 OF 4 · STUDY NOTES

Build a Real AI App & CRM in Real Time

From Brief to Working App — No Code Required



Complete study notes covering every slide from Workshop 2.
Leave today with a working CRM — not homework.

AI WITHOUT FEAR · DOUGLAS MIZZI · AIWITHOUTFEAR.COM.AU



Table of Contents

Chapter 1 — Welcome & What We Are Building Today	4
What we will build together	4
Who this workshop is for	4
Chapter 2 — What Is an App? What Is a CRM?	5
Websites, apps, and tools — the three-way distinction	5
CRM — your customer memory	6
Chapter 3 — The Problem: Why Businesses Lose Customers	7
Chapter 4 — The Shift: Before & After Your CRM	8
The transformation in daily life	8
What you will build today — the live CRM	9
Chapter 5 — Meet Deep Agent, Your AI Builder	10
Chapter 6 — Writing Your Development Brief	12
The B·R·I·E·F framework explained	12
A complete sample brief in action	13
Chapter 7 — The Master Handover Brief	15
Why the brief matters more than the build	15
Step 1 — Use a thinking LLM	15
Step 2 — Dictate in your own words	16
What the MHB must contain	17
Real worked example — Pharmaceutical Sales CRM	19
Weak vs strong briefs — the comparison	22
The full MHB journey — four steps	23
Chapter 8 — Your CRM in Detail	24
The dashboard decoded	24
AI-drafted follow-ups — nothing falls through	25

User access and security	26
Stripe payments — getting paid without leaving your CRM	27
Branding and customisation	
Chapter 9 — What You Take Home & Next Steps	
Your three deliverables from today	
Monday morning — your first 30 minutes	
Workshop 3 preview and real business impact	

Welcome & What We Are Building Today

"You leave today with a working CRM — not homework."

What We Will Build Together

Workshop 2 has one mission: **you leave with a working app in your hands**. Not a PDF of ideas. Not a slide deck of inspiration. A real, live CRM — a piece of software your business will use tomorrow morning.

This is a full-day intensive, and every hour of it is pointed at the same target. By the time you walk out, you will have moved through four concrete stages:

- 01 Write the brief in plain English.** You will describe your business, your customers, and what you need the app to remember — no technical vocabulary required. Your words become the blueprint.
- 02 Deep Agent builds — watch the app appear in minutes.** You hand your brief to Abacus.AI's Deep Agent tool, and you watch it write the code, design the interface, and wire up the data in real time. No developer needed.
- 03 Tour your CRM.** Once built, you will explore every part of your new app: customer cards, the sales pipeline, automated follow-ups, and the settings that keep it running smoothly.
- 04 Take it live.** The final stage connects your CRM to the real world — payment processing through Stripe, secure logins for your team, and your own custom domain.

THE WORKSHOP PROMISE

Most workshops leave you with notes and good intentions. This one leaves you with **software**. The gap between "I should build something" and "I built something" closes today.

Who This Workshop Is For

Douglas built this workshop for three kinds of people — and the common thread is not technical skill; it is the pressure of running something real with customers who deserve to be looked after properly.

Business Owners

You are juggling customers across notebooks, inboxes, spreadsheets, and your own memory. Something always falls through the cracks. You need a single place where every customer lives.

Managers & Operators

You are tired of chasing updates from your team and following up on dropped follow-ups. You need visibility without having to ask for it every day.

Entrepreneurs

You are launching something new and you need real tools fast, without the budget or the time to hire a developer. Deep Agent gives you both speed and quality.

No Coding Background Required

The only prerequisite for today is curiosity. If you can describe your business in a conversation, you have everything you need to build with Deep Agent.

WHY "NO CODE" REALLY MEANS IT

In previous generations, building an app meant hiring a developer, writing specifications, waiting weeks, and paying thousands. Deep Agent collapses that entire process to a single conversation — and this workshop shows you exactly how to have that conversation well.

What Is an App? What Is a CRM?

Building the vocabulary you need for the rest of the day.

Websites, Apps, and Tools — The Three-Way Distinction

People use the words "website," "app," and "tool" interchangeably. For today, we need to be precise — because each does a fundamentally different job, and you are building something specific.

Term	What It Does	Example
Website	Shows information to the world — your presence online.	Your business homepage explaining what you do and how to reach you.
App	Does work for you — a system that runs behind the scenes, storing, tracking, and acting on data.	Your CRM tracking every customer, every deal, every promise made.
Tool	Helps with one specific task — narrow, focused, single-purpose.	A calculator, a booking form, a signature capture widget.

Today you are building an **App** — not a brochure, not a single-function tool, but a living system that does real work for your business every single day.

THE KEY INSIGHT

A website is a face. An app is a brain. You might already have a face. Today you get the brain.

SLIDE 5 · DEFINITIONS 02 — WHAT IS A CRM?

CRM — Your Customer Memory

CRM stands for *Customer Relationship Management*. That sounds corporate, but the idea is simple and powerful:

"A CRM is your customer memory — it remembers every customer, every conversation, and every promise you made — so you don't have to."

Every small business owner has the same experience: a customer calls, you know you spoke to them three months ago, there was a quote involved, and you think you promised to follow up — but the details are scattered. A CRM ends that entirely.

A well-designed CRM answers three questions instantly, for every single customer:

WHO

They Are

Contact info, company, history, preferences

WHEN

You Last Spoke

Date, channel, what was discussed, what was sent

WHAT

Happens Next

Scheduled call, pending quote, follow-up trigger

A Real Customer Card — Maria Rodriguez

Here is the kind of information your CRM will hold for every customer. Notice how everything you could need is in one glance:

CUSTOMER CARD — MARIA RODRIGUEZ

Name: Maria Rodriguez · **Company:** Rodriguez Interiors

Status: Hot Lead · **Last Contact:** 3 days ago — quote sent

Next Action: Follow-up call Thursday 10am

Deal Value: \$8,400

With a card like this, every person on your team — including you — knows exactly where Maria stands and exactly what to do next. No hunting. No guessing. No dropped balls.

The Problem: Why Businesses Lose Customers

Sticky notes. Inbox threads. That spreadsheet someone updated last March.

The Real Cost of Scattered Information

Here is what most small and medium businesses are actually running on: a combination of notebooks, email threads, mental recall, and "that spreadsheet." It feels like it works — until a customer slips through, a deal goes cold, or a promised follow-up simply never happens.

The numbers below reflect common findings across small and medium businesses. They are not alarming statistics invented to scare you — they describe the quiet, invisible cost that adds up week after week:

79%

of leads never get followed up in a consistent, timely way

5 hrs

per week lost hunting for customer information across systems

1-in-4

dollars in repeat revenue is left uncaptured from existing clients

WHAT THIS LOOKS LIKE IN PRACTICE

A sticky note on the monitor for Maria. An email thread buried in Inbox with John's specifications. A quote saved in a folder no one else knows about. An invoice that was due last week — and no one noticed because no one was watching. This is not a technology failure; it is a *system* failure. And a CRM is the system that fixes it.

The important thing to recognise is that none of this is the fault of you or your team. You are not disorganised — you simply never had a system designed to hold this information. Humans are not built to remember every promise made to fifty customers. A CRM is.

WHY THIS WORKSHOP EXISTS

Every business that has grown past a handful of customers needs a CRM. Until recently, building one required a developer, a budget of thousands, and weeks of waiting. **Today that changes.** You are going to build yours in a single day — and it will be yours to keep.

CHAPTER 4 · SLIDES 7-8

The Shift: Before & After Your CRM

The same business. Completely different experience.

SLIDE 7 · THE SHIFT

The Transformation in Daily Life

The contrast between a business running without a CRM and one running with it is not just efficiency — it is a completely different relationship with your customers and your own sanity. Here is how the same four moments feel, before and after:

The Question	Before — Without a CRM	After — With Your CRM
Finding a customer	"Where did I save Maria's number?"	Maria's card opens with one click — full history, contact, status, next action.
Tracking replies	"Did anyone reply to John? I can't remember."	John's reply is logged automatically — you see it the moment you open his card.
Finding a quote	"What did we quote them again? Was it in email?"	The quote is attached directly to the deal — one click, right there.
Overdue invoices	"Wait — that invoice was due last week."	Tomorrow's follow-ups are queued and waiting — nothing surprises you.

Read that table again slowly. The "after" column is not a fantasy — it is what your CRM will do from Day 1.

SLIDE 8 · TODAY'S BUILD

What You Will Build Today — The Live CRM

Here is the exact target. By the end of today's session, your working CRM will include all of the following features — live, functional, and yours:

Customer Cards with Full History

Every customer gets their own card containing contact info, project stage, quote details, last interaction, and next scheduled action.

Drag-and-Drop Sales Pipeline

Deals move visually through stages — New Lead, Contacted, Quoted, Won. No spreadsheet formulas. No manual updating. Just drag and drop.

Auto-Generated Follow-ups

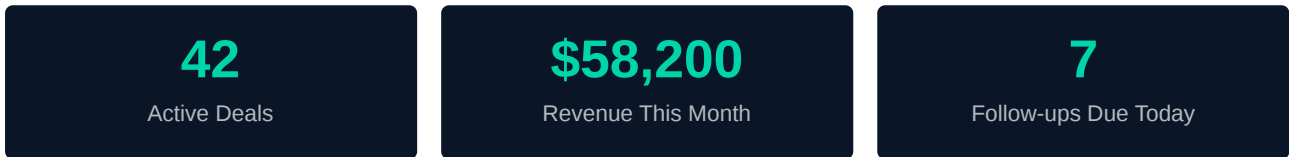
Set the rules once. The CRM writes and queues personalised follow-up messages in your voice — you just approve and send.

Secure Logins & Stripe Payments

Two-factor authentication for your team. Stripe payment links wired directly into deals — customers pay without you chasing invoices.

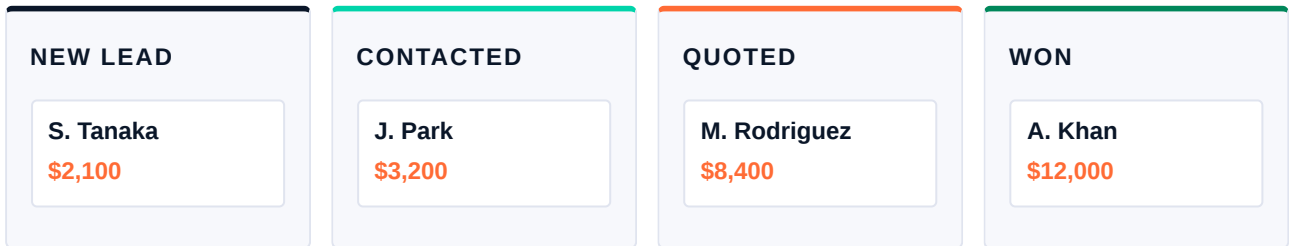
Your Dashboard at a Glance

The moment you log into your CRM, you see the pulse of your business at a single glance. No hunting through reports. No adding up columns. Just the numbers that matter, right there on your screen:



Your Sales Pipeline

Here is how the pipeline looks with real deals flowing through it. Every deal card shows the customer name and dollar value at a glance:



Meet Deep Agent — Your AI Builder

"You describe it in plain English. Deep Agent ships a real, working app."

The Tool That Builds for You

Everything you are going to build today runs on **Deep Agent**, a feature inside the Abacus.AI platform. It is not a template-filler or a drag-and-drop form builder — it is a genuine code-writing AI that constructs real applications from a description you give it in ordinary language.

The nickname is "the one that builds." Here is what Deep Agent actually does when you hand it your brief:

- 1 **Writes the code.** Deep Agent generates the underlying software that powers your app — the logic, the database connections, the business rules you described. You never see the code; it just works.
- 2 **Designs the UI.** It creates the user interface — the screens, buttons, forms, dashboards, and navigation that you and your team will click through every day.
- 3 **Connects the data.** Deep Agent sets up the data structure — the fields, relationships, and storage that make your app remember everything you need it to remember.

WHAT MAKES DEEP AGENT DIFFERENT

Most AI tools help you think, write, or generate content. Deep Agent is in a different category entirely — it *ships product*. When the process is done, you do not have a diagram of an app or a list of features to hand to a developer. You have the app itself, running, live, accessible in a browser.

SLIDE 10 · MORNING CHECKPOINT

Morning Checkpoint — Five Things You Now Know Cold

Before the lunch break, Douglas runs a quick check to make sure the foundations are solid. By this point in the workshop, you should be comfortable with all five of the following ideas. If any feel shaky, re-read the chapters above.

MORNING CHECKPOINT — TICK EACH ONE

- **What an app really is** — and how it differs from a website or a tool.
- **What a CRM does for you** — your customer memory, answering Who / When / What Next.
- **The cost of scattered information** — the invisible drain on time and revenue that most businesses accept as normal.

- **What you are building today** — a live CRM with pipeline, follow-ups, payments, and team logins.
- **Deep Agent — your builder** — the Abacus.AI tool that turns your plain-English description into a working app.

AFTER LUNCH

The afternoon session moves into action. You will write your development brief, hand it to Deep Agent, and watch your CRM come to life. The quality of that brief is the single biggest factor in how good your app turns out — which is exactly why the next chapter is the most important one of the day.

CHAPTER 6 · SLIDES 11–12

Writing Your Development Brief

"If you can describe it, Deep Agent can build it."

SLIDE 11 · STEP 01 — WRITING YOUR BRIEF

Talk to It Like a Brilliant New Assistant

Before you open Deep Agent, you need a brief. Think of it as the instructions you would give to a new employee who is extraordinarily capable but knows nothing yet about your business. The more clearly and specifically you explain things, the better the result.

"Talk to it like you'd talk to a brilliant new assistant on day one. Tell it what your business does, who you serve, and what you need it to remember."

There are three rules that consistently separate a brief that produces a great app from one that produces a frustrating rebuild:

- 01 **Plain English, not tech jargon.** You do not need to know the difference between a database and an API. Describe your business the way you would explain it to a friend. "I need to track which customers I've quoted and whether they've replied" is perfect. "I need a relational data structure with API endpoints" is not necessary.

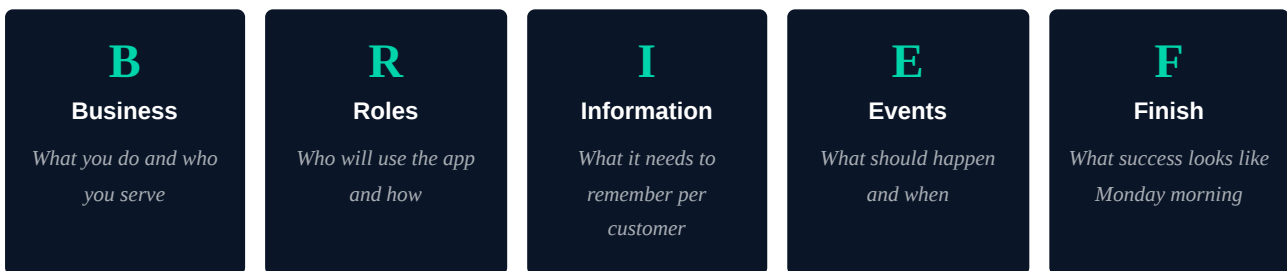
02 Specific over clever. Vague inputs produce vague outputs. "I want something to manage customers" gives Deep Agent very little to work with. "I want to see each customer's name, company, last contact date, quote value, and what I should do next" is the kind of specificity that produces a great result.

03 Examples beat adjectives. Instead of saying "I want a clean, professional interface," describe a real customer situation: "On Monday morning I want to open the app and immediately see everyone I need to call this week." Concrete scenarios help Deep Agent understand your actual needs.

SLIDE 12 · THE B·R·I·E·F FRAMEWORK

The B·R·I·E·F Framework — Five Elements of a Great Brief

To make brief-writing as straightforward as possible, the workshop uses a five-part framework. Work through each letter and by the end you will have everything Deep Agent needs:



Let us look at each element in depth, because the clarity you bring to each one will show up directly in the quality of your finished app:

B — Business: What You Do and Who You Serve

Describe your business in two to three sentences. What product or service do you provide? Who are your typical customers? What does a normal customer journey look like from first contact to payment? Deep Agent needs this context to understand the purpose of the app it is about to build for you.

R — Roles: Who Will Use the App and How

Will only you use this app, or will your team use it too? List the roles — for example: Owner (sees everything), Sales staff (sees their own customers), Accountant (sees payment records only). Different roles need different levels of access, and specifying this in your brief prevents confusion later.

I — Information: What It Needs to Remember

This is the heart of your CRM. List every piece of information you need to track per customer. Contact details are obvious — but what else? For a trades business it might be: site address, job type, preferred contact time, referral source. For a design studio: project stage, quote value, revision count, install date. Be

specific here; every field you name becomes a real field in your app.

E — Events: What Should Happen and When

What are the triggers and automations you need? "When I send a quote, remind me to follow up in three days if there is no reply." "When a deal is marked Won, send a welcome email." "Every Monday morning, show me a list of this week's follow-ups." These event descriptions become the automation rules baked into your app.

F — Finish: What Success Looks Like Monday Morning

Describe the ideal scenario: it is Monday at 8am, you open the app, and you feel in complete control. What does that screen look like? What information is front and centre? What is already done for you before you have had your coffee? This "finish line" description helps Deep Agent optimise the design for your real daily workflow.

A Complete Sample Brief — Rodriguez Interiors

Here is the workshop's worked example — a brief written for a custom interiors studio. Notice how it is written in plain, conversational English yet covers all five elements of the framework:

SAMPLE BRIEF — RODRIGUEZ INTERIORS

I run a custom interiors studio called Rodriguez Interiors. My team is me and two designers. We serve home owners who want custom kitchens, bathrooms, and living spaces.

For each customer I need to track: their contact info, which project stage they are in (enquiry, design, quoted, in progress, complete), the quote we sent them, the last time we touched base, and what the next step is.

When a quote is sent, remind me to follow up in 3 days if there is no reply from the client.

On Monday morning, I want to open the app and see everyone I need to call this week – sorted by priority, with their quote value visible.

That brief is not technical. It does not mention databases, APIs, or code. It describes a real business situation in real language — and it gives Deep Agent everything it needs to build the right app.

The Master Handover Brief

"The magic sauce. Do not rush the planning stage — everything is in the planning."

SLIDE 13 · WHY THE BRIEF MATTERS

Why the Brief Matters More Than the Build

There is a temptation to skip straight to opening Deep Agent and typing your idea. Resist it. The planning stage is where the quality of your app is decided. The actual building happens in minutes — but if you hand Deep Agent a vague or incomplete description, you get a vague and incomplete app. The fix is not to spend more time in the builder; the fix is to spend more time on the brief.

Brief Quality	What Happens Next
Vague, rushed brief	Deep Agent builds something generic. Key features are missing. The app misses your vision. You need to correct it, rebuild sections, and explain things twice.
Detailed Master Handover Brief	Deep Agent understands exactly what to build. The app matches your vision closely. Fewer corrections. Less rebuilding. Time and energy saved.

Think of the brief as a blueprint. A builder who works from a detailed blueprint constructs a house that looks like what the owner imagined. A builder who works from a napkin sketch makes decisions based on guesswork. Deep Agent is extraordinarily capable — but it can only build what it understands.

THE GOLDEN RULE

"Do not rush the planning stage. **Everything is in the planning.**"

SLIDES 14 · STEP 01 — START WITH A THINKING LLM

Step 1 — Use a Thinking LLM Before You Use Deep Agent

Here is the key insight that separates this process from simply typing a prompt into Deep Agent: you do not go straight to the builder. You first work with a thinking LLM — a conversational AI assistant — to organise and structure your ideas into a proper Master Handover Brief (MHB).

The process looks like this:

- 1 **Open Abacus.AI and choose a strong LLM.** Inside Abacus.AI, select a powerful language model. If a "thinking mode" or "reasoning mode" toggle is available, enable it — this activates deeper analytical processing that is especially useful for turning rough ideas into structured documents.
- 2 **Tell it you want to build an app.** Start the conversation by explaining that you want to build a detailed app, that you are going to dictate rough notes, and that you need it to turn those notes into a complete Master Handover Brief for Deep Agent.
- 3 **Set the LLM's job clearly.** The LLM's role is to organise, structure, and expand your raw ideas — not to make decisions for you. It should ask clarifying questions if anything is unclear, and it should produce a document that Deep Agent can work from directly.

WHY THIS TWO-STEP APPROACH WORKS

A conversational LLM is designed for back-and-forth dialogue. Deep Agent is designed for action — it takes a document and builds from it. By using the LLM to turn your rambling, natural-language ideas into a structured brief, you give Deep Agent the kind of clear, organised input it thrives on. Two specialist tools, each used for what it does best.

SLIDE 15 · STEP 02 — DICTATE IN YOUR OWN WORDS

Step 2 — Dictate Your Idea in Your Own Words

Once your LLM is set up and ready, your job is simple: explain your idea. Do not try to be polished or technical. The LLM's job is to turn raw material into a structured document — your job is just to provide the raw material.

"Your job is to explain the idea. The LLM's job is to turn that idea into a professional Master Handover Brief."

Follow these guidelines when you dictate:

- **Speak plain English.** No technical vocabulary required. Describe your business the way you would to a friend.
- **Don't worry if ideas are out of order.** Start wherever feels natural. The LLM will organise it.
- **It is okay to ramble and repeat.** Repetition often reveals emphasis. What you come back to twice is probably important.
- **Cover the full picture:** your business idea, your workflow, the features you want, and the outcome you are hoping for.
- **Give enough detail to capture your full vision.** This is the most important point. A brief that covers only the obvious features will produce an app that only does the obvious things. The details you share about edge cases, specific workflows, and future plans lead to a much richer result.

AFTER YOU DICTATE

The LLM will summarise your notes, ask any clarifying questions, and then structure your ideas into a complete Master Handover Brief. Review it carefully. Add anything missing. This document is your blueprint — it is worth the extra ten minutes to get it right.

SLIDE 16 · WHAT THE MHB MUST CONTAIN

What the Master Handover Brief Must Contain

The Master Handover Brief is "the bridge between your rough idea and the app Deep Agent builds." It is a formal planning document — detailed enough that Deep Agent can begin building without needing to ask you questions. A good MHB typically covers all of the following:

App Purpose

What problem does this app solve? What business need does it address? One or two clear sentences.

Target User

Who will use this app daily? What is their technical comfort level? What are they trying to accomplish?

Main Features

A complete list of every function the app needs. Be specific and exhaustive — leave nothing assumed.

Screens & Dashboards

What screens will the app have? What information appears on each one? What does the main dashboard show?

User Workflow

Walk through a typical day. What does the user open first? What do they do next? What does the end of the workflow look like?

AI Features

Any intelligent automation — AI-drafted emails, smart suggestions, automated triggers. Describe the desired behaviour, not the technology.

Data Requirements

What information needs to be stored per customer, per deal, per project? Where does existing data come from (Excel, CSV, another system)?

Automations

What should happen automatically? Follow-up reminders, status updates, email triggers, calendar events — describe each rule in plain English.

ALSO INCLUDE

Future expansion ideas — features you do not need now but might want later. Deep Agent can structure the app to accommodate them. Also include any **clarification questions** — things you are not sure about yet. The LLM will flag these and help you think them through before the build begins.

DEFINITION

The Master Handover Brief is "the detailed planning document given to Deep Agent before the app build begins."

SLIDE 17 · THE MAGIC SAUCE

The Magic Sauce — Why Detail Produces Quality

Douglas describes the Master Handover Brief as "the magic sauce." Here is why:

Deep Agent is a powerful tool, but like any tool, the quality of the output depends entirely on the quality of the input. When you hand it a vague paragraph, it makes assumptions. Some assumptions will be right. Many will not match what you had in mind. The result is an app that sort of works but requires significant correction.

When you hand Deep Agent a five-to-ten-page Master Handover Brief — covering your business, your users, your features, your workflow, and your end result — there are almost no assumptions to make. It builds what you described, because you described it clearly.

5–10

pages is a normal, healthy
Master Handover Brief

More

context always equals a better-
built app

Zero

technical skill needed to write a
great brief

A COMMON MISTAKE TO AVOID

People often feel that writing a five-page document for an app sounds like a lot of work. But consider: hiring a developer to build the same app would involve weeks of meetings, written specifications, and revisions. A five-page MHB written in an hour is an extraordinary shortcut. The planning time pays back immediately in build quality.

SLIDES 19–21 · REAL WORKED EXAMPLE

Real Worked Example — From Rough Dictation to Master Handover Brief

This is the workshop's full live demonstration of the MHB process. A pharmaceutical sales representative needs a CRM to manage pharmacy relationships across three regions of Queensland. Watch how a rough, rambling dictation becomes a structured, professional brief.

The Rough Dictated Idea — Exactly as Spoken

This is what was actually dictated to the LLM. Notice how it is unpolished, incomplete in places, and has ideas in no particular order. This is perfectly fine — the LLM's job is to work with this:

RAW DICTATION — PHARMACEUTICAL SALES CRM (VERBATIM)

I want you to build me a fully functional app. I want the UI to be dark not light.

I am after a CRM and Customer management app that has the ability to use AI include my notes and seamlessly. Add those notes into an email that we can produce when sending out email to the new customers.

This CRM is about developing emails and using the information and the options to seamlessly create these emails. It is important that the emails are not templated rather that the AI agent that we use to decipher the emails is smart enough to summarise everything and create a human style email to the Customer as if I wrote it.

I want to have a number of features for different options of what we offer which I will discuss with you as the app starts to get built out – as the app starts to expand each option for the template must have a back office editable section that I can click onto that I can change and add information to that specific option.

I'm going to use this app for identifying potential customers within the Brisbane area. I will at a later date want these expanded into also a Sunshine Coast locality as well as a Gold Coast locality.

I am a sales rep for a pharmaceutical company and so I am looking at developing a list of all the pharmacies within those three areas that we can visit as part of my sales customer service.

I will create a separate XLR file with all of the pharmacies in each of those three locations the Sunshine Coast, Brisbane, and the Gold Coast. This Excel file spreadsheet will contain all of the details such as Pharmacy name, postcode, address.

Under each client Card I will have the following hot keys to press which will be: hot prospect, send email and follow up, active Customer, and not interested.

Once I press any of these hot keys, it will then migrate back the Customer card into those separate following areas that I can access from the master homepage on the app.

As I said the purpose of this app is not just to act as a CRM but most importantly to be able to write the emails as an introductory email once I have spoken to the Pharmacy manager.

I also want a calendar added to each client Card with notes next to the calendar. I want that calendar to send me an email reminder the

day before the appointment is due to ensure that I have the appointment logged into my appointment schedule as a reminder – this can be sent to me at 8 am the previous day. I also want the calendar to have a cancel button on there so I can remove any dates easily.

Let's start with this as an app. If you have any questions please follow up.

This is a rough idea. It is not polished, but it contains valuable information. Notice what it captures: the visual style, the core function, the geographic scope, the data source, the status system, the automation needs, and the most important differentiator (human-style AI emails). The LLM now has material to work with.

The Transformed Master Handover Brief

Here is what the LLM produced from that rough dictation. A five-section structured document that Deep Agent can act on directly:

MASTER HANDOVER BRIEF — AI-POWERED PHARMACY CRM

Project Title: AI-Powered Pharmacy CRM & Email App

Core Objective: Import pharmacies, add notes, generate AI-written emails in the rep's own voice, track follow-ups, and manage a calendar with automatic reminders.

Target User: One pharmaceutical sales representative managing multiple pharmacy relationships across South-East Queensland.

Geographic Scope: Brisbane, Sunshine Coast, Gold Coast

UI Style: Dark theme throughout

Client Status Hot Keys

Hot Prospect — actively pursuing

Send Email & Follow Up — next action queued

Active Customer — current client

Not Interested — archive, stop following up

AI Email-Writing Feature

Takes rough notes or bullet points and generates a natural, human-style email in the rep's own voice. Explicitly NOT template-based. Each email should read as though personally written.

Calendar & Reminders

Appointment scheduling with automated email reminders sent at 8am the day before. Cancel button on each calendar entry to remove reminders cleanly.

Data Import

Import existing pharmacy list from Excel spreadsheet. Field mapping to align Excel columns to app fields.

App Structure — Six Sections

The LLM also recommended a six-section app structure based on the dictated requirements:

- 1 Homepage Dashboard** — summary view: today's follow-ups, hot prospects, recent activity.
- 2 All Pharmacies** — searchable, filterable list of all clients by region and status.
- 3 Client Card Page** — individual pharmacy record with full history, notes, emails sent, and current status.
- 4 AI Email Generator** — input notes, generate human-style email, review and send or copy.
- 5 Back Office / Admin** — user settings, import data, configure statuses and fields.
- 6 Calendar & Follow-Up** — visual calendar, appointment entries, 8am email reminders, cancellation controls.

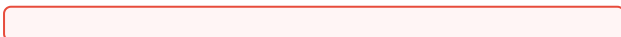
THE TRANSFORMATION IN ACTION

The rough dictation ran to about 130 words. The Master Handover Brief the LLM produced from it covered five pages and captured every feature in structured, actionable language. That is the transformation: your rough ideas become Deep Agent's clear instructions.

SLIDE 18 · WEAK VS STRONG BRIEFS

Weak vs Strong Briefs — The Comparison

To make the stakes concrete, here is a side-by-side comparison of what happens when you hand Deep Agent a weak brief versus a strong one:



WEAK BRIEF — WHAT GOES WRONG

- Creates confusion — Deep Agent makes assumptions that do not match your vision
- Back-and-forth corrections — multiple rebuilds to get features right
- App misses the vision — missing screens, wrong workflows, incomplete features
- Rebuilds required — time and energy spent fixing instead of using

STRONG BRIEF — WHAT GOES RIGHT

- Deep Agent understands exactly what to build — no guesswork
- Fewer corrections needed — the first version is close to the final version
- App matches the vision — right screens, right workflow, right features
- Saves time and energy — you spend your time using, not rebuilding

SLIDE 22 · THE FULL MHB JOURNEY

The Full MHB Journey — Four Steps

The complete process from rough idea to working app now has a clear four-step shape. This is the framework you will use every time you build with Deep Agent — not just today, but for every app you create in the future:

- 01 Dictate your rough idea.** Speak naturally. No tech required. Cover your business, your customers, the features you want, and the outcome you're aiming for. Rambling is fine. The messier and more detailed, the better the LLM has to work with.
- 02 The LLM creates the structure.** The LLM organises your messy notes into a professional, structured Master Handover Brief. Review it carefully. Add anything missing. This is your blueprint.
- 03 Give the brief to Deep Agent.** Paste your MHB into Deep Agent and let it build. Because the brief is detailed and clear, Deep Agent builds correctly — right the first time, or very close to it.
- 04 Better brief = better app.** This is not a once-off insight — it is a principle. Every time you build with Deep Agent, the planning stage is where quality is created. Invest time there and the build takes care of itself.

"The better the Master Handover Brief, the better Deep Agent can build the app. Dictate the rough idea, let the LLM create the structure, then hand Deep Agent a proper blueprint."

Your CRM in Detail

Dashboard, follow-ups, security, payments, and branding — every feature explained.

The Dashboard Decoded — Four Things You See at a Glance

Your CRM's opening screen is designed to answer the most important business question of any given day: "What do I need to do right now?" Everything on the dashboard is there by design. Here are the four sections and what each one tells you:

- 1 **Pulse Bar — Your Business at a Glance.** The three numbers at the top of the screen give you a complete business summary before you have read a single email: active deals in flight, total revenue this month, and follow-ups due today. If you check nothing else in a morning, check the Pulse Bar.
- 2 **Pipeline — Drag Deals Through Stages.** Your sales pipeline sits below the Pulse Bar, showing every active deal organised by stage. To move a deal forward, you drag it. To see the detail, you click it. No spreadsheet formulas, no manual status updates — the pipeline does it all visually.
- 3 **Activity Feed — Every Interaction in One Stream.** The activity feed logs every email sent, every call noted, every file attached — for all customers, in chronological order. It is the complete history of your business relationships, flowing in real time.
- 4 **Modules — One Click Between Functions.** The navigation panel gives you one-click access to every part of the CRM: Customers, Pipeline, Follow-ups, Payments, and Settings. Everything is one click away — no hunting through menus.

Real Apps Built in Workshops Like This One

To show the range of what is possible, the workshop showcases three working apps built by previous participants — all built using the same Deep Agent process you are following today:

Industry	App Name	What It Does
----------	----------	--------------

Trades & Field	Office in a Pocket for Tradies	Full CRM and job management — customers, quotes, job cards, and invoices all in one place. Designed to run on a phone at a job site.
Events & Venues	Venue Tracking & Email App	Track venue relationships, manage contacts, and send AI-crafted personalised emails with a single click. Built for an event coordinator managing dozens of venues.
Health & Wellness	Health Blogger App	AI-powered content creation platform for a health professional — generates blog posts, articles, and social media content instantly from rough topic notes.

THE COMMON THREAD

All three apps were built in a workshop session, by a non-technical participant, using exactly the same process: Master Handover Brief, then Deep Agent. The diversity of industries shows that this approach is not sector-specific — if your business has customers and information to manage, Deep Agent can build the tool you need.

SLIDE 25 · AI-DRAFTED FOLLOW-UPS

AI-Drafted Follow-ups — Nothing Falls Through the Cracks

One of the most powerful features of your CRM is the automated follow-up system. This is where the business impact of the app becomes most visible in your daily revenue and close rate.

Here is the three-step flow. It happens automatically, without you initiating anything:

- 01 Triggered.** The automation fires when a pre-set condition is met — for example, a quote was sent three days ago and there has been no reply from the customer. The CRM detects this automatically.
- 02 Drafted.** The AI writes a follow-up message in your voice — personalised, friendly, relevant to the specific customer and deal. Not a generic template. A message that reads like you wrote it.
- 03 You Approve.** The draft appears in your queue. One tap: Approve & Send. Or Edit, then Send. Or Skip. You are always in control. Nothing goes out without your approval.

A Real Example Follow-up Email

Here is the kind of message your CRM might generate for the Maria Rodriguez scenario — a quote sent three days ago, no reply received:

AI-DRAFTED FOLLOW-UP — AUTO GENERATED BY YOUR CRM

To: maria@your-interiors.com.au

Subject: Following up on your quote – anything I can clarify?

Hi Maria,

Just circling back on the quote I sent Tuesday. Happy to walk you through the kitchen-island options whenever works for you.

– Doug

That message is short, warm, personal, and perfectly timed. It took you zero minutes to write. You simply tap **Approve & Send**, and it is on its way — automatically logged on Maria's customer card.

4x

more deals closed through consistent, timely follow-up

0

minutes spent writing each follow-up — AI drafts it

100%

of follow-ups reviewed by you before sending — you stay in control

SLIDE 26 · USER ACCESS AND SECURITY

User Access and Security — Who Can See What

A CRM holds sensitive customer data. The role and permission system built into your app ensures that each member of your team sees exactly what they need — and nothing they should not. Here is how the four default roles are structured:

Role	Customers	Pipeline	Payments	Settings
Owner	All	All	All	All
Manager	All	All	View	—
Sales Rep	Own only	Own only	—	—
Accountant	View	—	All	—

These roles are customisable in your app settings. You can rename them, adjust their permissions, and add new roles as your team grows.

Three Security Pillars

- 1 Encrypted at rest.** All customer data stored in your CRM is encrypted — scrambled into unreadable form if ever accessed without authorisation. This is the same standard used by banks and large enterprises.
- 2 Strong logins.** Two-factor authentication comes out of the box. Even if a password is compromised, the second factor keeps the account secure.
- 3 You own the data.** You can export your entire customer database at any time. There is no lock-in. Your data is yours, and you can take it with you if you ever move to a different system.

SLIDE 27 · STRIPE INTEGRATION

Stripe Payments — Get Paid Without Leaving Your CRM

One of the most impactful integrations in your CRM is payment processing through Stripe — one of the world's most trusted payment platforms. Deep Agent wires the Stripe connection directly into your app, so collecting payment becomes a seamless part of your customer workflow.

"Get paid — without leaving your CRM. Stripe handles the money. Deep Agent handles the wiring."

The payment flow works in three steps that happen entirely inside your CRM:

- 1 Customer pays.** You send one link from the deal card. The customer clicks it and pays using their card, Apple Pay, or Google Pay — whatever is most convenient for them.
- 2 Stripe processes.** The payment is handled by Stripe's infrastructure — bank-grade security, PCI compliant. You never touch or store payment card details on your servers.
- 3 Your CRM updates.** The moment payment clears, the deal automatically moves to "Paid" status, a receipt is emailed to the customer, and the transaction is logged on their card. Everything is done.

THREE THINGS WORTH KNOWING ABOUT THE STRIPE INTEGRATION

No payment data on your servers — Stripe holds it, not you. **Setup in minutes** — connect your Stripe account through the Settings page, test it, and it is live. **Receipts are auto-emailed** — customers receive a professional receipt automatically, with your branding.

Branding and Customisation — Make It Yours

The CRM your Deep Agent builds starts as a clean, functional application. The customisation step — which takes under thirty minutes — transforms it from a generic tool into something that looks and feels like your business:

Logo & Wordmark

Upload your logo once and it appears across the entire app — the header, the login page, the customer-facing payment page. Your brand is always present.

Brand Colours

Choose your two primary brand colours and apply them app-wide with one action. Buttons, highlights, accents — all updated instantly to match your visual identity.

Custom Fields

Add fields that are unique to your business. A flooring company tracks Square Footage and Install Date. A marketing agency tracks Referral Source and Monthly Budget. The CRM adapts to how you actually work.

Workflows

Edit the automation triggers and follow-up timing to match your sales cycle. Want a 5-day follow-up instead of 3? Change one setting. Want a different message trigger? Update the workflow rule.

THE RESULT

Within thirty minutes of completing the build, your CRM looks like a product your business had built specifically for it. Customers who pay through the Stripe integration see your branding on the payment page. Team members log in to an app that reflects your company identity. It does not feel like generic software — it feels like your software.

What You Take Home & Next Steps

"Not notes. Tools. Everything you built today is yours to keep — forever."

Your Three Deliverables from Today

Most workshops leave you with a notebook of ideas. This one leaves you with three tangible assets — each one useful on its own, and together forming a complete operating system for your customer relationships:

01 Working CRM — Live Software.

Your actual CRM application, live and secured, hosted on your own domain. Not a demo. Not a prototype. A real working app your business can use from tomorrow morning. Customer cards, pipeline, follow-up automation, Stripe payments, team logins — all set up and running.

02 Dev Brief Template — The Exact Framework.

The B·R·I·E·F framework and the Master Handover Brief template, formatted and ready to reuse. Fill it in once for the next app you want to build — whether that is a booking system, a job management tool, or a client portal. The framework works for every project.

03 Workflow Guide — Day-One Playbook.

A PDF playbook that walks your team through how to use the CRM from Day 1. Covers logging in, adding customers, moving deals through the pipeline, reviewing follow-up drafts, and using the payment link. Hand it to any new team member and they are up to speed immediately.

THE VALUE CALCULATION

A custom CRM built by a developer typically costs between \$5,000 and \$25,000 — and takes three to six months. Today's workshop costs \$500 and you walk out with the app. **The payback period is measured in weeks, not years.**

SLIDE 30 · MONDAY MORNING

Monday Morning — Your First 30 Minutes

You have the CRM. Now what? The Monday morning routine is the fastest path from "I have an app" to "my business is running on it." Five steps, under thirty minutes, and your whole team is operational:

- 1 **Log in and set your password.** Use the email from your workshop registration. Set a strong, memorable password. If you have two-factor authentication enabled (recommended), complete that setup now.

- 2 Import your existing customers.** Drop your CSV file or paste directly from your spreadsheet. The CRM will map your columns to the right fields — name, company, email, phone, and any custom fields you added.
- 3 Set your pipeline stages.** The default stages are New Lead, Contacted, Quoted, Won. Edit them to match how your business actually sells. If you have different stage names — Enquiry, Site Visit, Proposal, Approved, Installed — change them now.
- 4 Turn on follow-up automation.** Go to the Automations section, pick the rules that match your workflow, and enable them. Approve the first few AI-drafted follow-ups manually to get a feel for the tone — then let the system run.
- 5 Invite your team.** Add your team members and assign the roles you set up during the build. They will receive an invitation email with login instructions. From this moment, everyone is working from the same system.

THE FIRST WEEK

Your goal in the first week is not perfection — it is *habit formation*. Every time you speak with a customer, log it. Every quote you send, attach it to the deal. Every promised follow-up, set the trigger. After five working days of consistent use, the CRM will already have more useful information in it than the scattered system it replaced.

SLIDES 31–33 · WORKSHOP 3 AND BUSINESS IMPACT

Workshop 3 Preview — Build Your Website and Connect Everything

Your app is live. The next workshop gives it a home online — and connects every piece of your digital business into one coherent presence.

COMPLETE

1

AI Foundations + Image & Video

AI literacy, prompting mastery, image and video generation tools.

Prompting

Midjourney

AI Video

YOU ARE HERE

2

Build a Real AI App & CRM

Deep Agent, Master Handover Brief, live CRM, payments, team access.

Deep Agent

CRM

Stripe

COMING NEXT

3

Build Your Website & Connect Your App

Professional website with Deep Agent, embed your CRM, domain, and complete digital presence.

Website

Domain

Integration

COMING SOON

4

AI Chatbots, SMS Automation & Abacus Claw

Customer-facing chatbots, SMS follow-up automation, and advanced Abacus.AI features.

Chatbot

SMS

Automation

In Workshop 3, you will use Deep Agent again — this time to build a professional website. You will then connect your website directly to the CRM you built today, creating a seamless flow: a customer fills in a form on your website, and a new lead card appears in your CRM automatically. Web presence and AI app become one complete digital business.

The Real Business Impact

These figures are based on common small-business benchmarks and participant experiences across the workshop series. They give a sense of the realistic return you can expect once your CRM is running and your team is using it consistently:

+6 hrs

reclaimed every week — time previously lost hunting for information

+38%

follow-up close rate — more deals won through consistent follow-up

Week 1

payback — the \$500 workshop cost typically returns in the first week of use

THE FINAL WORD FROM DOUGLAS

"You built something real today. Open your CRM tonight. **Send your first follow-up tomorrow.**"

Connect with Douglas

If you have questions about your CRM after the workshop, want to discuss a feature you are thinking about adding, or are ready to register for Workshop 3:

Email

douglasmizzi@me.com — Douglas answers personally. If something is not working, drop him a line.

Website

aiwithoutfear.com.au — workshop dates, registration for upcoming sessions, and resources.

WORKSHOP 3 — SAVE YOUR SEAT

Your app is live. Now give it a home online and connect everything together. Register for Workshop 3 — Build Your Website and Connect Your App — at aiwithoutfear.com.au before seats are gone.

AI Without Fear · Workshop 2 Study Notes · Douglas Mizzi · aiwithoutfear.com.au

These notes are a companion to the live workshop. All statistics cited are illustrative benchmarks based on common SMB findings.