

SOP SCALE ON PURPOSE

THE SCALE ON PURPOSE AI CHEAT SHEET

How to Make AI Do 92% of the Work in
Business Funding, Credit Repair & Tax Professional Services

Stop working like it's 2020. Your competitors are already using AI.

You show up for the 8% that only you can do. AI handles the rest.

- ✓ **The Three Levels of AI** — and why 95% of financial pros are stuck on Level 1
- ✓ **The Reverse Prompt Formula** — that generates perfect client emails, proposals, and SOPs every time
- ✓ **How to turn AI outputs into** — reusable company IP — the cheat code that scales your business
- ✓ **The AI Agent method** — that closes funding deals and repairs credit files while you sleep
- ✓ **8 Industry-Specific Prompt Templates** — for funding, credit repair, and tax professionals

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The Hard Truth About AI in Financial Services

Most business owners in the funding, credit, and tax spaces are still copy-pasting generic prompts from a YouTube video, babysitting every output, and wondering why AI hasn't changed their business yet.

Here is the hard truth: **the problem isn't the tool. It's the strategy.**

The AI models of 2026 are frighteningly capable. They don't need your four-step prompting formula anymore. They need Context. Autonomy. Direction. Give them that, and they run.

That is what this cheat sheet is built for.

Inside, you will discover the **92% Rule** — the operating standard for elite AI-powered financial businesses. When you set it up right, AI handles 92% of the execution. You show up for the final 8%: the vision, the judgment, the relationship building, and the creative call that only you can make.

That is not a productivity hack. That is a business model.

But you cannot get there by skipping steps. You have to understand the **Three Levels of AI** in order to take full advantage of it. This cheat sheet is your roadmap through all three. No fluff. No theory. Just the exact framework that separates operators who are *using* AI from the ones who have built an AI-powered machine that works without them.

The shift already happened. The only question is which side of it you're on.

The Three Levels of AI

Understanding how to deploy AI effectively requires recognizing the different tiers of capability. Think of these levels as modes of transportation:

Level	Concept	The Analogy	Primary Function	Key Tools
Level 1 Conversational Chat	The Skateboard	You do the pushing, but the tool helps you move faster and smoother.	Ideation, drafting, research, and strategy refinement.	Claude, ChatGPT, Gemini
Level 2 Connective Automation	The Electric Scooter	You define the route, and a motor propels you forward automatically.	Connecting inputs to outputs, handling repetitive backend tasks without human intervention.	Zapier, Make.com, n8n
Level 3 Autonomous Agents	The Personal Driver	You provide the destination; the AI plans the route, drives the car, and parks it.	Executing complex, multi-step tasks that require reasoning, tool use, and adaptability.	Manus AI, Claude CoWork, Apex

Most entrepreneurs stop at Level 1. They chat, they copy, and they paste. To build a highly scalable, million-dollar financial business without proportionally scaling your headcount, you must master all three.

CHAT — Mastering the Skateboard

At the foundational level, AI acts as your strategic sounding board and rapid content generator. However, the traditional approach of pushing rigid instructions onto the AI is dead. To get elite-level results, you must leverage the best prompt strategy: **Reverse Prompting**.

The Reverse Prompting Cheatsheet

Amateurs push information at AI (e.g., "Write me an email about my new funding product"). This results in generic, uninspired outputs that require heavy editing. Professionals use **pull prompting**. You tell the AI what you want to achieve and force it to extract the necessary context from you.

AMATEUR PUSH PROMPTING	PROFESSIONAL PULL PROMPTING
"Write me a credit repair proposal."	"I need to write a credit repair proposal for a small business owner. Before you write it, ask me 5-7 questions about their credit profile, their goals, and my service offering."
"Write a funding pitch deck."	"I need a funding pitch deck for a restaurant owner seeking \$150K. Before you draft it, ask me 5-7 questions about their revenue, collateral, and the lender type I am targeting."
"Write a tax planning summary."	"I need a year-end tax planning summary for a self-employed client. Before you write it, ask me 5-7 questions about their income type, deductions, and filing status."

The Future-Proofing Cheat Code — Build Your Company IP

Reverse prompting is the fastest way to turn a successful AI interaction into a reusable, scalable asset. It is the secret to building your company's intellectual property.

- 1. Iterate to Perfection** Work with your AI of choice until it produces an absolutely perfect first draft of an asset — a client email, a funding proposal, a credit dispute letter, or a standard operating procedure.
- 2. Extract the System Prompt** Once the output is dialed in, give the AI this command: *"Write the comprehensive system prompt that would have generated this exact output from the beginning."*
- 3. Save and Scale** The AI will generate a highly detailed prompt. Save this as your System Prompt for that specific task. You can now distribute this to your team or use it to build a Custom GPT. Flawless execution every single time.

LEVEL 2

AUTOMATION — Riding the Electric Scooter

Level 2 is where you step away from the chat window and start building systems that run while you sleep. Automation takes a defined, repetitive task and ensures it runs perfectly on a trigger.

Building Connective Workflows

Automation is about connecting the many software tools in your business so that data flows seamlessly between them. This eliminates the manual data entry and follow-up that drains your team's time.

The AI Automation Blueprint — Automated Lead Nurture for Funding & Credit Pros

STEP 1 TRIGGER	STEP 2 ACTION 1	STEP 3 ACTION 2 (AI)	STEP 4 ACTION 3 (SEND)
A new lead books a consultation via Calendly for credit repair or business funding.	Make.com scrapes the lead's website or LinkedIn to gather context about their business type and industry.	The scraped data is sent to Claude with a system prompt to write a highly personalized pre-meeting email referencing their specific challenges.	The email is automatically drafted and sent to the prospect — zero manual effort from your team.

By setting up these workflows, you buy back hours of manual labor every week, ensuring a premium experience for your clients with zero ongoing effort from your staff.

3 Automation Examples Built for Your Industry

- **Business Funding:** When a merchant cash advance applicant submits a form, automation pulls their bank statement PDF, sends it to AI for a cash flow summary, and emails your underwriter a pre-scored application — before you ever touch the file.
- **Credit Repair:** When a new client signs their service agreement, automation triggers a welcome sequence, requests their credit reports, and drafts a personalized dispute letter strategy based on the derogatory items detected — all before your first call.
- **Tax Professionals:** When a client uploads their W-2s and 1099s to your portal, automation sends the documents to AI for a preliminary income summary, flags potential deductions, and schedules a review call — saving 2 hours of prep per client.

LEVEL 3

AGENTS — Hiring the Personal Driver

This is the leading edge of AI in business. While automation follows a rigid, pre-programmed path (if X happens, do Y), AI Agents can reason, plan, and execute open-ended goals.

Autonomous Execution

Agents do not just help you think — they act on your behalf. You provide the destination, and the agent determines the necessary steps to get there. The only requirement? Access. Give it access to Google Drive, Notion, Slack, Calendar, and Email, and watch it execute exactly what you want.

Try This Example: The Financial Document Audit Agent

THE GOAL	THE EXECUTION
"Look at the client's uploaded tax returns and bank statements in Google Drive, audit their financials over the past 12 months, identify discrepancies or missing information, and draft a summary report for our underwriting team."	The agent navigates the drive, analyzes the data, synthesizes the findings, and delivers a comprehensive, actionable underwriting summary — in minutes, not hours.

The Digital Twin — Your AI Operator

There is a massive difference between an AI assistant and an AI operator. An assistant waits to be asked. An operator shows up, knows the priorities, and executes. One saves you minutes. The other saves you roles.

Think about everything you do that is repeatable: triaging email, monitoring affiliate KPIs, handling follow-ups, executing routine compliance checks. None of that requires *you*. It requires your logic, your rules, your priorities. But not your hands on a keyboard.

That is the concept of a **Digital Twin**: an autonomous agent running 24/7 that operates like you, without being you.

3 Agent Use Cases for Financial Pros

- **Business Funding:** An agent monitors your pipeline daily, follows up with stalled applications, requests missing documents, and updates your CRM — all without you touching a single deal until it is ready to close.
- **Credit Repair:** An agent tracks dispute timelines across all active clients, sends bureau follow-up letters when deadlines approach, and notifies clients of score changes — managing 200 clients with the precision of a team of 10.

■ **Tax Professionals:** An agent monitors IRS deadline calendars, sends client reminders 30/15/7 days before due dates, and drafts extension requests for at-risk clients — eliminating the most stressful part of tax season.

Exclusive Bonus: Industry-Specific Prompt Templates

These are not generic prompts. Every template below is engineered specifically for business funding, credit repair, and tax professionals. Copy, paste, and let AI do the heavy lifting.

FUNDING: Affiliate Partner Outreach

"I need to write a cold outreach email sequence to recruit high-value affiliate partners (e.g., real estate agents, auto dealers, insurance brokers) for my business funding company. Before you draft this sequence, ask me 5 to 7 questions about my target partner profile, the commission structure, and my unique value proposition to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

CREDIT REPAIR: Client Onboarding Automation

"I need to create a seamless, automated onboarding sequence for new credit repair clients that sets expectations, requests necessary documents, and builds trust from day one. Before you build this sequence, ask me 5 to 7 questions about the required documents, the typical timeline for results, and the tone of my brand to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

TAX PROS: Year-End Tax Planning Summary

"I need to write a year-end tax planning summary and checklist for self-employed clients and small business owners. Before you write it, ask me 5 to 7 questions about their income type, common deductions, filing status, and my service offerings to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

FUNDING: High-Converting Landing Page Copy

"I need to write high-converting copy for a landing page targeting small business owners who need fast working capital or merchant cash advances. Before you write this copy, ask me 5 to 7 questions about the specific pain points of my target audience, the minimum requirements for funding, and the primary call-to-action to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

CREDIT REPAIR: Dispute Letter Generator

"I need to create a system prompt for an AI tool that generates customized credit dispute letters for my clients based on their specific derogatory items. Before you build this system prompt, ask me 5 to 7 questions about the bureaus I target, the types of items I dispute, and the legal language requirements to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

ALL INDUSTRIES: Financial Compliance Review SOP

"I need a standard operating procedure (SOP) for reviewing all marketing materials and social media posts to ensure they comply with financial regulations (FTC, CFPB, state-specific rules). Before you outline this SOP, ask me 5 to 7 questions about my specific industry niche, the platforms I use, and my current review process to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

FUNDING: Scaling Strategy & Systems

"I need a plan to scale my business funding operations and affiliate distribution network without losing quality or burning out my team. Before you propose this scaling strategy, ask me 5 to 7 questions about my current growth rate, my operational constraints, my top affiliate channels, and my expansion goals to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

TAX PROS: Client Retention & Upsell Sequence

"I need an email and SMS sequence to retain existing tax clients year-round and upsell them on bookkeeping, payroll, or business advisory services. Before you write this sequence, ask me 5 to 7 questions about my current service menu, my client demographics, and the typical off-season pain points of my clients to ensure you have all the context needed to give me the best possible output. Ask the questions one at a time."

Ready to Scale On Purpose?

Imagine doubling the productivity of your business, without adding team members.

That is exactly what our **Live & Digital AI Workshops** offer. We provide advanced training in implementing, optimizing, and leveraging cutting-edge AI tools to automate your workflows and build your business with AI.

This is not just any training. It is a deep, transformative approach to building systems and supercharging your business growth in the credit repair, business funding, and tax professional space.

Join our affiliate program to grow your business by leveraging our products and services. Learn how to scale from our Live & Digital AI Workshops.

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