

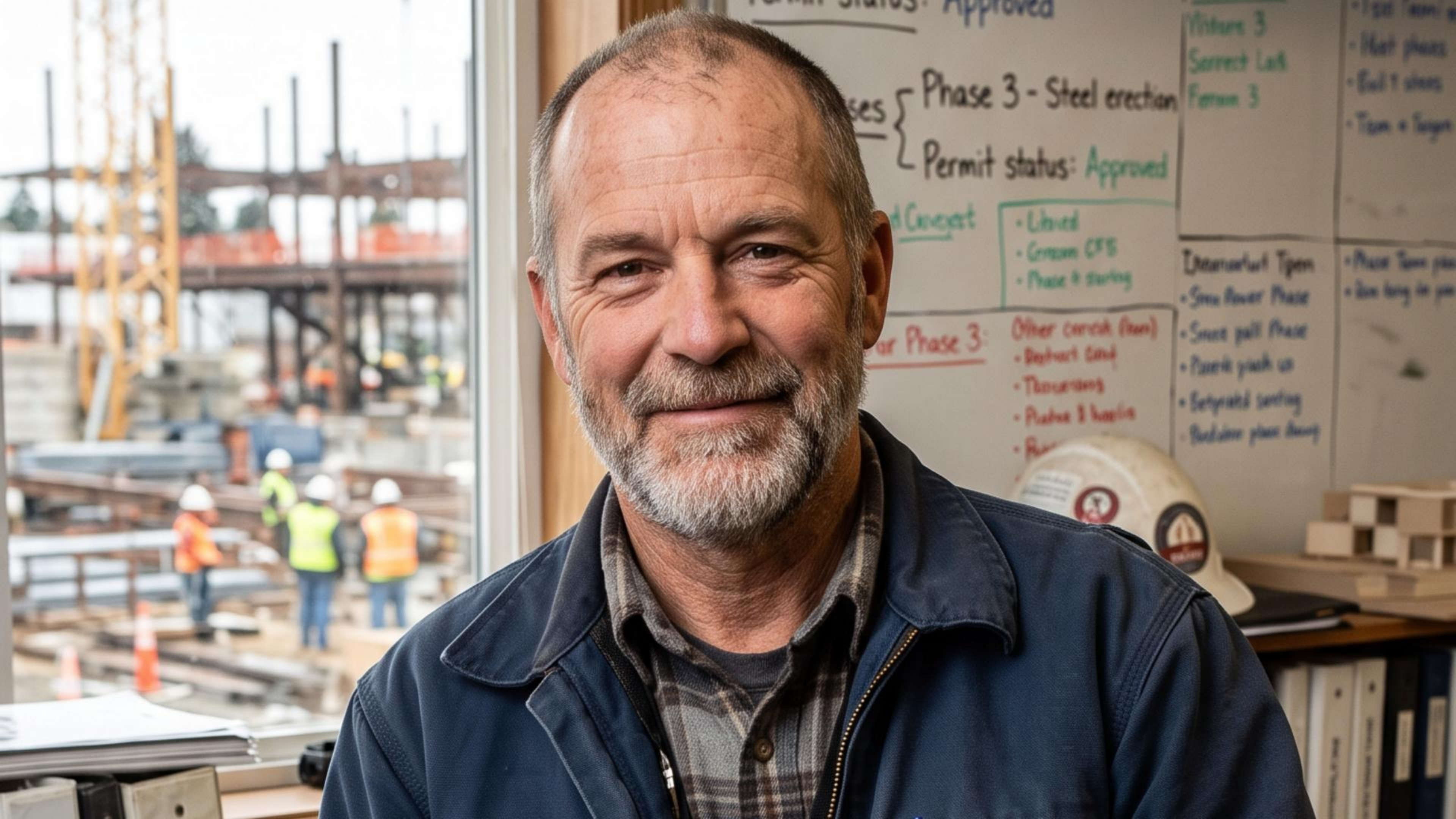
• CONTEXT, CONNECTORS, AUTOMATION, AND SKILLS

The Treasure in Your **Filing Cabinets**

PRESENTED BY

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Permit status: Approved
Phases { Phase 3 - Steel erection
Permit status: Approved

- and Concept
- Lived
 - Green CFS
 - Phase 3 starting

- for Phase 3:
- Other correct (run)
- Decking
 - Timbering
 - Phase 3 loading
 - Phase 3

- Volume 3
Correct Lock
Form 3
- Ultimate Tip
- Green River Phase
 - Green Hill Phase
 - Phase 3
 - Phase 3
 - Phase 3



Mike knows things.

What Mike knows.

- 01 Which supplier's delivery estimate needs a follow-up call.
- 02 Why you sequence this kind of job a particular way.
- 03 What this owner expects before approving a change.
- 04 What went wrong on the last similar project.
- 05 Who to call when the documented process stops working.

This is experience your company has **already paid for.**

Home

RFIs

Submittals

Schedule

Daily Log

Documents

Meetings

RFIs

14 OPEN · 61 CLOSED

No.	Subject	Assigned to	Due	Status
042	Dock door header detail at grid C-4	Architect	Sep 10	Overdue
045	Conduit routing conflict, electrical room	Engineer of record	Sep 19	Open
046	Paint finish, exterior canopy steel	Owner’s rep	Sep 22	Open
047	Slab joint layout, Area B	Engineer of record	Sep 24	Open
048	Fire alarm device locations, mezzanine	Architect	Sep 26	Open

You have another Mike.

Procore knows things, too.

Home

RFIs

14 OPEN · 61 CLOSED

RFIs	01	Which RFIs are open.	No	Subject	Assigned to	Due	Status
Submittals			042	Dock door header detail at grid C-4	Architect	Sep 10	Overdue
Schedule	02	What the project schedule says.					
			045	Conduit routing conflict, electrical room	Engineer of record	Sep 19	Open
Daily Log	03	Which submittals are awaiting action.					
			046	Paint finish, exterior canopy steel	Owner's rep	Sep 22	Open
Documents							
	04	What yesterday's daily report recorded.	047	Slab joint layout, Area B	Engineer of record	Sep 24	Open
Meetings							
	05	What was assigned in the last meeting.	048	Steel truss locations, mezzanine	Architect	Sep 26	Open

Mike knows **why**. Procore records a lot of the **what**.

What does any of this have to do with AI?

WHAT MIKE KNOWS

Experience and judgment

Relationships and expectations

How your company works

WHAT YOUR SYSTEMS CONTAIN

Project records and status

Dates, assignments, documents

What has been documented

Context.

The relevant information AI has available when it does a job. Without it, you're asking someone who has never worked here to act like they have.

Your company knows things your competitors don't.

01	02	03	04	05
Your estimating assumptions.	Your operating procedures.	Your project history.	Your lessons learned.	Your customer relationships.

Other companies can buy access to the same AI. They don't automatically get **the experience your company has accumulated.**

Let’s put that knowledge to work.

One ordinary task, preparing for a project meeting, improved a step at a time.

0 1	0 2	0 3	0 4	0 5	0 6
Manual preparation	Generic AI	Connected project information	Business context	Scheduled preparation	Reusable skill

First: no AI.

WESTGATE DISTRIBUTION CENTER

Weekly Coordination Meeting

Thursday, September 17 · 9:00 AM · Job trailer

AGENDA

1. Safety
2. Schedule
3. RFIs and submittals
4. Budget
5. Open actions

THE ACTUAL WORK

Open every system.

Read the messages.

Check last week's notes.

Ask Mike.

Decide what deserves attention.

The agenda takes five minutes. Knowing what to put under the headings **takes the rest of your morning.**

Now ask a chatbot.

Create an agenda for our weekly construction project meeting.

AI

Here is an agenda you can use for your weekly meeting:

Weekly Construction Project Meeting Agenda

SAFETY	Discuss recent incidents, near misses, and upcoming safety focus areas.
SCHEDULE	Review progress against the baseline schedule and upcoming milestones.
RFIS AND SUBMITTALS	Review the status of open RFIs and pending submittals.
BUDGET	Discuss budget status and any pending change orders.
OPEN ACTIONS	Review open action items and assign new ones as needed.

Excellent. We have successfully **automated the headings.**

It knows construction. It doesn't know **this** construction project.

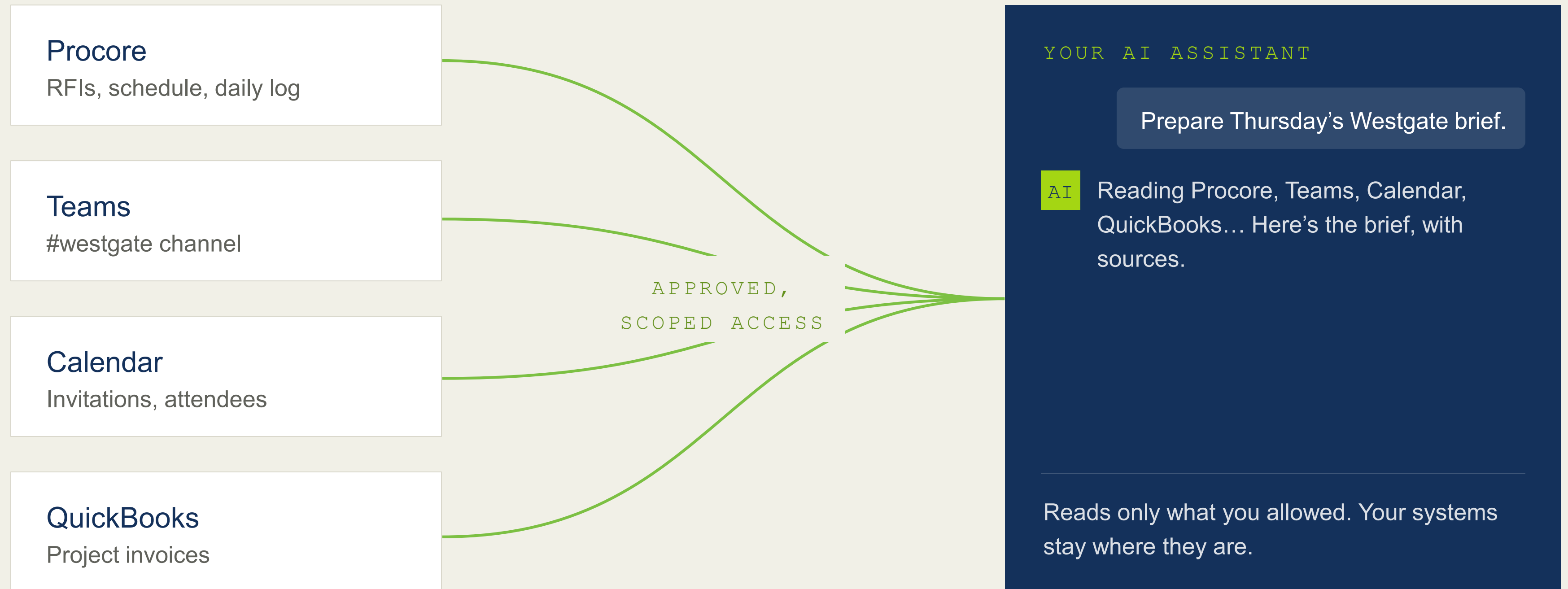
01
What changed since last week?

02
What is still unresolved?

03
Which decision is needed now?

04
Who needs to make it?

Your systems connect into the chat you already use.



Whether it's called MCP, an integration, or a connector: **controlled access from your systems into the chat.**

Connect Procore and Teams.

Connect to our Procore project for Westgate and the #westgate channel in Teams.

AI

Connected. With the access you approved, I can now read:

■ PROCORE · CONNECTED

Westgate: RFIs, schedule, submittals, daily log

■ TEAMS · CONNECTED

#westgate channel, read only

I'll only use what you've approved. Want me to rebuild the agenda from what's actually in these?

Now the agenda knows what happened.

Yes. Prepare the agenda for Thursday's Westgate coordination meeting.

AI

MEETING BRIEF · WESTGATE

THU SEP 17

Weekly Coordination Meeting

SAFETY	No incidents in this week's daily reports.	Procore daily log
SCHEDULE	Delivery mismatch. Schedule: install Oct 7. Supplier update: delivery Oct 12.	Procore schedule Teams #westgate
RFIS AND SUBMITTALS	Open clarification. RFI 042 still needs a response.	Procore RFIs
BUDGET	No connected source yet.	—
OPEN ACTIONS	Follow-up. Confirm the access restriction in the latest daily report is resolved.	Procore daily log

Now we have something to discuss. The date mismatch is a question to investigate, not proof of a delay.

Connect the calendar.

Connect my Outlook calendar and update the brief.

AI

Calendar · Connected Thursday 9:00 AM. Invited: PM, superintendent, architect, owner’s rep.

MEETING BRIEF · WESTGATE · WEEKLY COORDINATION		THU SEP 17 · 9:00 AM
SAFETY	No incidents in this week’s daily reports.	Procore daily log
SCHEDULE	Delivery mismatch. Schedule: install Oct 7. Supplier update: delivery Oct 12.	Procore schedule Teams #westgate
RFIS AND SUBMITTALS	Open clarification. RFI 042 still needs a response.	Procore RFIs
	Meeting on Thursday. The architect is invited. Flag who responds.	Calendar invitation
BUDGET	No connected source yet.	—
OPEN ACTIONS	Follow-up. Confirm the access restriction in the latest daily report is resolved.	Procore daily log

From “here are some problems” to “**here’s what this meeting might actually resolve.**”

Connect accounting.

Connect QuickBooks, Westgate project only, read only.

AI

QuickBooks · Connected Scoped to Westgate, read only.

MEETING BRIEF · WESTGATE · WEEKLY COORDINATION

THU SEP 17 · 9:00 AM

SAFETY	No incidents in this week's daily reports.	Procore daily log
SCHEDULE	Delivery mismatch. Schedule: install Oct 7. Supplier update: delivery Oct 12.	Procore schedule Teams #westgate
RFIS AND SUBMITTALS	Open clarification. RFI 042 still needs a response. Decision item. The architect is invited. Flag who responds.	Procore RFIs Calendar invitation
BUDGET	Outstanding balance. A project invoice is unpaid. Confirm with accounting before discussing externally.	QuickBooks project view
OPEN ACTIONS	Follow-up. Confirm the access restriction in the latest daily report is resolved.	Procore daily log

Accounting may have **a different version** of how well the project is going.

Same meeting. Much better preparation.

STARTING POINT

Discuss schedule

Review RFIs

Review budget

Follow up

ENRICHED PREPARATION

Resolve the delivery and installation date mismatch

Address RFI 042 with the appropriate decision-maker

Confirm a specific outstanding balance internally

Check named actions against the latest available records

The improvement came from giving AI access to **relevant parts of your business.**

We connected the software. What about Mike?

We've connected everything with a login. We still haven't connected the guy who knows why any of it matters.

- 01 Flag delivery mismatches before the coordination meeting.
- 02 Bring supporting records when requesting an owner decision.
- 03 Keep internal financial issues out of external meeting materials.
- 04 End every action item with an owner and a due date.

Get what Mike knows into something reusable.

01	02	03	04
A short, consented interview.	A project debrief.	An annotated example of a good meeting brief.	A checklist or SOP.

Don't ask Mike to document everything he knows. **Ask him to walk you through preparing for this meeting.**

Now the preparation works the way your company works.

Here are Mike’s rules for preparing this meeting. Apply them to the brief.

`westgate-meeting-prep-rules.md`

AI

MEETING BRIEF · WESTGATE

RULES APPLIED

DECISIONS

RFI 042, dock door header detail. Architect to respond. Attached: RFI log, drawing C-4.

DISCUSS

Delivery mismatch. October 7 vs. October 12. **Unconfirmed.**
Sources: Procore, Teams.

ACTIONS

Confirm access restriction resolved. Owner: Superintendent. Due: Friday. For PM review.

INTERNAL

Outstanding balance on a project invoice. Confirm with accounting. **Not for the external agenda.**

MIKE’S RULES

Decisions first.

Supporting sources attached.

Internal issues separated.

Unconfirmed information labeled.

Actions assigned for human review.

Stop remembering to ask.

Every Wednesday at 3 PM, prepare a draft brief for Thursday’s Westgate coordination meeting and send it to me for review.

AI

Scheduled · Weekly · Wed 3:00 PM Each run will:

01

Retrieve current information from approved sources.

02

Apply the preparation instructions.

03

Create the draft.

04

Notify you for review.

What arrives, and what happens when something fails.

SCHEDULED RUN · WEDNESDAY 3:02 PM



Draft brief for Thursday is ready for your review. One source was unavailable.

DRAFT · WESTGATE · THURSDAY COORDINATION

RETRIEVED WED 3:02 PM

WHAT CHANGED Supplier delivery moved to October 12.
RFI 045 answered.

SOURCES Procore, Teams, Calendar. Retrieved
3:02 PM.

DECISIONS RFI 042 response from architect.

UNAVAILABLE Accounting information was unavailable.
Financial review is incomplete.

OPEN ACTIONS Access restriction: Superintendent, due
Friday.

STATUS Draft. Not distributed.

The PM reviews before distribution. **Scheduling does not remove accountability.**

Turn the working process into a skill.

SKILL

Weekly Project Meeting Prep

TARGET	Which project and meeting to prepare for
SOURCES	Which sources to consult
LOOK FOR	What changes and issues to look for
RULES	The company's preparation rules
OUTPUT	The required output format
MISSING	What to do when information is missing

A skill is a **reusable package of instructions, examples, and rules**. We got it working for one project. Now we can reuse the method without reinventing the instructions.

CONNECTION	provides access
SKILL	describes the method
SCHEDULE	says when to run it

Use the same skill on the next project.

Run Weekly Project Meeting Prep for Harbor Point, Tuesday's OAC meeting.

AI

Same method, this project's sources. Before I run it, here's what differs from Westgate:

	WESTGATE	HARBOR POINT
SOURCES	Procore, Teams #westgate, Calendar, QuickBooks	Procore, Teams #harbor-point, Calendar. Accounting access pending.
MEETING	Thursday coordination	Tuesday OAC
OWNER RULES	Supporting records with every decision request	48-hour notice on change requests

Standardizing the preparation **while keeping it specific to the job.**

Who is your Mike? What does your meeting need?

0 1 Name one recurring task that requires hunting for information.

0 2 Identify the person and systems that hold what it needs.

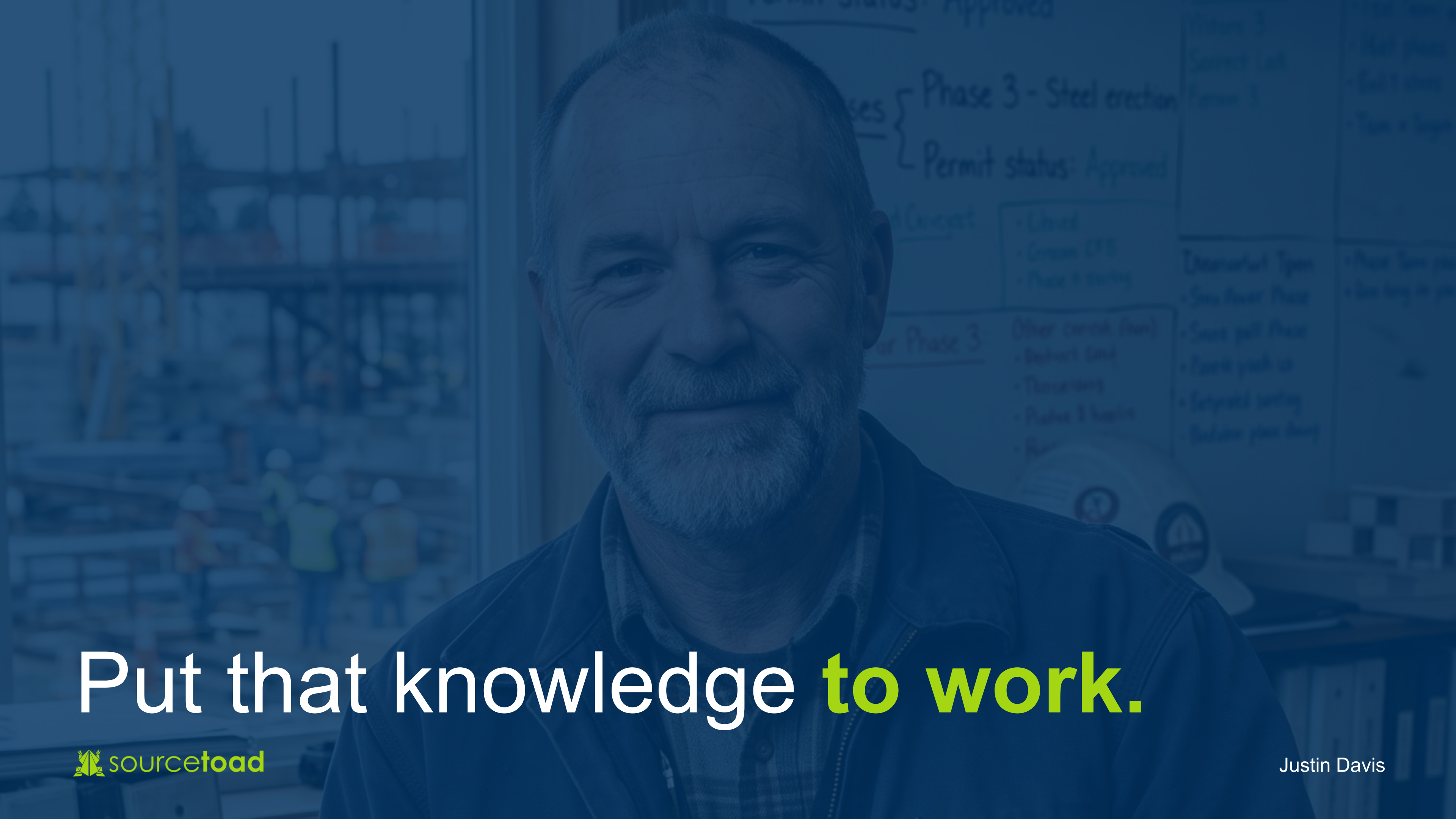
0 3 Pick one source to make available first.

0 4 Define what a better result would look like.

You don't have to organize the entire company before you begin. **Start with the information needed to do one useful job.**



Mike knows things.



Put that knowledge **to work.**