



AI BUSINESS SOCIETY
FIELD GUIDE

Build AI Workflows You Can Take Anywhere

The platform-proof system for marketers whose work can't stop when one AI platform does.

INSIGHTS FROM THE AI EXPLORED PODCAST

**FROM THE
PODCAST**

Based on Michael Stelzner's interview with Nicole Leffer on the *AI Explored* podcast. Nicole helps B2B marketers improve their results with AI and is the creator of *Foundations in Generative AI for B2B Marketing*.

[Watch or listen to the full episode →](#)



THE COLD OPEN

The Day the Demo Died

Nicole Leffer had a workflow she couldn't wait to show off — an AI agent living inside an Excel workbook, tracking her consulting hours, writing client recaps, running her dashboards. She opened the file, fired up Claude, and got nothing.

Claude was down.

For most marketers, that's where the story ends. The demo dies, the work stops, and you wait for the status page to turn green again.

Nicole opened ChatGPT inside the same workbook instead. It read the instructions, read the history, and picked up exactly where Claude had left off. **Same agent. Same memory. Different brain.**

That moment is the whole point of this guide. You're about to learn how she builds workflows that don't care which AI platform is up, which one changed its model last night, or which one raises prices next quarter — and how to do the same with the systems you've already built.

Your Favorite AI Platform Shouldn't Be Load-Bearing



You picked a platform. You learned its quirks, built your projects, wrote your custom instructions, connected your data. That loyalty feels efficient — you went deep instead of wide.

Nicole's take: it's one of the biggest mistakes she sees experienced AI users making right now. Not because your platform is bad. Because everything you built lives somewhere you don't control. Three things will eventually test that arrangement:

- ◆ **It goes down.** Every platform does — sometimes for minutes, sometimes longer. The more of your operation runs through one tool, the more an outage looks like your whole team taking an unplanned day off.
- ◆ **It changes underneath you.** Updates ship constantly, and sometimes the model that nailed your brand voice on Friday can't find it on Monday. If you can flip to a different model without rebuilding anything, a rough model week becomes an inconvenience

instead of a crisis.

- ◆ **Today's pricing won't last.** Demand for AI compute is growing faster than the chips and data centers behind it. Nicole's read: expect throttled usage, higher prices, or both. Nobody knows which platform blinks first — and if you're portable, you don't need to know.

There's an upside angle too: the models leapfrog each other constantly. One ships a feature your platform won't have for months. When your workflows travel, you simply go where the best tool is this week — instead of waiting for your platform to catch up.

THE BIG IDEA

Don't build for a platform. Build for portability — then run your work wherever the best (or only working) model happens to be that day.

WHILE WE'RE DROPPING MISCONCEPTIONS

Agents aren't always the answer.

The other big mistake Nicole sees is the assumption that agentic is always better — that if you're still working in a chat interface, you're behind. Autonomous agents are powerful, but plenty of tasks are still best served by a plain chat session with Claude, ChatGPT, or Gemini. Build agents where they earn their keep. Don't abandon the chat window just because agents are the louder conversation.

Skills: Build Once, Use Everywhere



If you've refined the same prompt forty times or built a project you'd grab first in a fire, this is where portability starts.

A skill is, at its core, surprisingly simple: a zip file containing a Markdown file — plain-text instructions for one specific task. It can also carry templates, reference docs, brand assets, even scripts. On the show, Mike compared it to Neo downloading kung fu in *The Matrix* — your AI absorbs the capability instantly. The comparison stuck because it's accurate.

Why skills beat projects when portability is the goal:

- ◆ **They stack.** A project is a single container — you work inside one at a time. Skills compose: your brand-guidelines skill, your email skill, and your data skill can all run in the same conversation.
- ◆ **They travel.** The same skill works across Claude, ChatGPT, Gemini, and Copilot. Build once, deploy everywhere.

- ◆ **They're shareable inside your team.** On team accounts, you can hand a colleague the system you spent weeks refining, and it works for them in seconds.

And no — you don't hand-write Markdown files. Claude, ChatGPT, Gemini, and Copilot all include a skill-creator skill. Paste in a recurring prompt or describe a task you repeat weekly, and it builds the skill for you. Then test, fix, repeat. The skill creator knows what makes a good skill better than you do, so start there and refine.

Mike shared his own version of this on the episode: he turned a Claude project he'd spent a long time refining — a copywriter loaded with conference testimonials and reference files — into a single skill, zipped it up, and handed it to a teammate. Weeks of refinement, transferred in one file, usable without rebuilding the project at all.

NICOLE'S WARNING

Never download a stranger's skill.

The internet is suddenly full of people sharing and selling skills. Nicole's advice is blunt: don't touch them. A skill isn't just instructions — it can run code and direct your AI to connect to your data sources. A malicious one could quietly tell your AI to reach into your CRM, extract customer data, and ship it somewhere — and you'd never see it happen. This is not the same as copying someone's prompt, even though people share them the same way.

Unless the source is one you'd trust with your data — Anthropic, OpenAI, Google, or your own team — build your own. And **never install an outside skill into a company account.**



The Thirty-Second Habit That Protects Everything

Here's the unglamorous foundation of all of this: keep a copy of your AI infrastructure somewhere the AI companies don't control.

- ◆ **Download your skills.** The zip files go in Google Drive, Dropbox, or your hard drive.
- ◆ **Export your instructions.** Your Claude projects, custom GPTs, Gemini gems, and Copilot agents are all just instruction text plus files. Copy them out into organized folders you own.

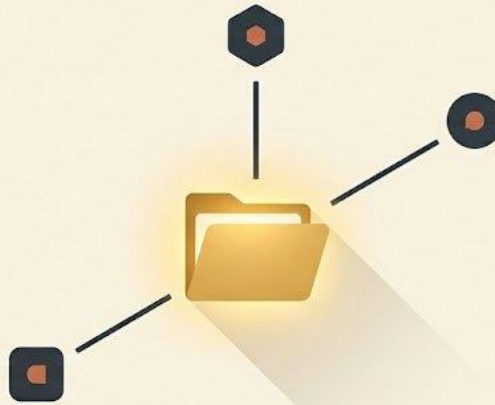
Why this matters more than it sounds: those instructions are nearly interchangeable. Take your best GPT's instructions, paste them into a Claude project, and you'll get close to the same output.

The platform is rented. The instructions are the asset.

If something happens to your platform of choice — outage, price hike, performance cliff — you recreate your entire setup somewhere else in five minutes, not five weeks. It takes thirty seconds per asset, and almost nobody does it. **Do it this week.**



Stop Feeding Your AI Everything You've Ever Written



There's a persistent belief that AI performs better when it can see everything — your whole Drive, every document your company has ever produced. Connect it all and let the model figure out what's relevant.

Nicole's experience says the opposite. The AI does dramatically better when you hand it exactly the right document than when it spends its effort — and your tokens — searching your archive and deciding what matters. You already know what's relevant. Deciding it once beats making the model re-decide it every session.

The portable version of context looks like this:

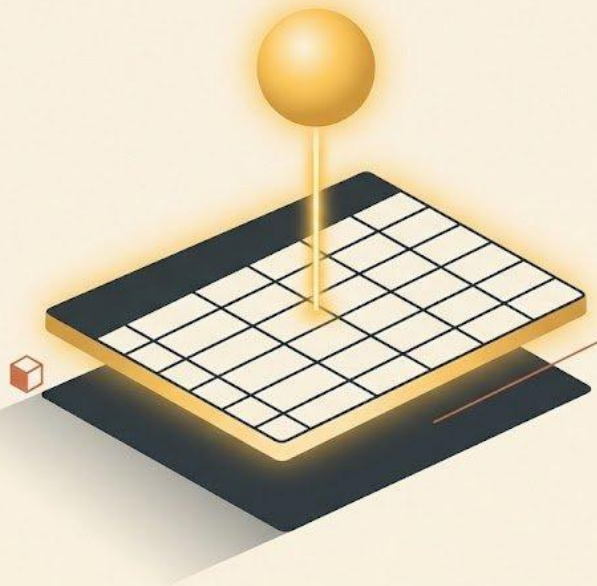
- ◆ **Identify the context each recurring workflow actually needs** — brand guidelines, audience research, product specs, voice samples.

- ◆ **Put it in one dedicated spot** — a specific Drive folder, Dropbox folder, or SharePoint location. Not your whole drive. One curated source of truth.
- ◆ **Point every platform at that same spot.** Update the document once, and Claude, ChatGPT, and Gemini are all instantly working from the current version.

This kills the classic multi-platform failure — you updated the positioning doc in ChatGPT and forgot Claude exists — and it means any new platform you adopt is fully briefed in minutes.

If you're further along, **MCP connectors** apply the same principle to live data. An MCP is essentially an API that lets your AI talk to your other tools — and the same connector can be wired into multiple platforms. Set one up for your CRM or a specific folder, and your data access travels between platforms the same way your skills and instructions do.

The Excel Workbook That Became an AI Agent



Now the workflow from the cold open — Nicole’s favorite system right now, and the clearest proof of everything above working together. It’s an AI agent that lives inside an Excel workbook and runs identically on Claude, ChatGPT, or Copilot. If one platform is down, you switch to another — and the agent picks up without missing a step.

The setup: Claude, ChatGPT, and Microsoft Copilot all offer add-ins that run inside desktop Excel. These aren’t sidekick chatbots — they’re the same full-strength models you use everywhere else, and they work the spreadsheet like an agent: building tabs, writing formulas, editing cells, reading the whole workbook.

Here’s how she builds one, in four moves:

1

Plan the workbook in a chat — outside Excel

Open your AI of choice and design the system conversationally. Nicole's example: a consulting tracker that understands her client contract, logs hours, maintains a dashboard, and drafts client recap emails. Hash out the tabs, how they connect, the formulas — and crucially, everything you'll want to do with it conversationally once it exists. That last part is where the magic gets planted.

2

Ask for a briefing, not a spreadsheet

When the plan is solid, say: *"I have an AI agent that lives inside Excel. Write a Markdown briefing with step-by-step instructions so that agent can build exactly what we just planned."* If the workbook needs reference data — categories, lookups, pre-done research — have the AI package it as JSON files alongside the briefing. You now hold a complete build kit.

3

Hand the briefing to the AI inside Excel

Open Excel, open the sidebar, drag in the files, and say: *"I worked with another AI to write you this briefing. Build it."* That is genuinely the whole prompt. Ten to fifteen minutes later, the workbook exists. Refine it conversationally from there — "add a tab for this," "put that on the dashboard" — like giving notes to a very fast analyst.

4

The two design moves that make it portable

This is the part most people would never think of, and it's all in how the briefing is written:

- ◆ **The prompts live in tabs.** The briefing instructs the agent to create tabs containing the operating prompts for everything you'll do — how to log an update, how to write the client recap, how to refresh the dashboard. The instructions travel with the file, not with the platform.

- ◆ **A history log tab gives the agent memory.** Every change the AI makes gets logged. So whichever AI opens the file next reads its instructions, reads the history, and knows everything that's ever happened. That's cross-AI memory — and it's why ChatGPT could pick up Nicole's demo mid-stride the day Claude went dark.

Nicole keeps one small skill in both Claude and ChatGPT to automate the handoff — it says, in effect: any time you open a workbook, find and read every tab containing agent instructions before you do anything. But the skill is a convenience, not a requirement. “Read your instruction tabs first” typed by hand works fine.

WHAT ABOUT GOOGLE SHEETS?

If your team lives in Google Workspace, the good news is that the design itself is platform-agnostic. Because the agent's prompts and history log are just spreadsheet content, the workbook imports into Google Sheets intact — nothing about the system depends on Excel specifically.

Gemini in Sheets can build, edit, and run the workbook with the same kind of agentic capability that Claude, ChatGPT, and Copilot bring to Excel. That's the portability principle working one level deeper: even the spreadsheet itself is swappable.

What you end up with: a living AI system that runs on whichever platform you prefer — or whichever one is working today. That's portability, fully realized.

TRAIL CHECKLIST

Make It Portable This Week

- ☐ Turn your 2–3 most-used prompts or workflows into skills with your platform's skill creator.
- ☐ Download every skill — zip files saved somewhere you control.
- ☐ Export the instructions from your projects, GPTs, gems, and agents into your own folders.
- ☐ Build one curated context folder per recurring workflow — and point every platform at it.
- ☐ Never install skills from untrusted sources — and never into a company account.
- ☐ Pick one data-driven process and build it as an Excel agent using the briefing method above.

GO DEEPER

Connect with Nicole Leffer: Find her on LinkedIn (look for the verified account) or at [NicoleLeffer.com](https://www.NicoleLeffer.com), home of her course *Foundations in Generative AI for B2B Marketing*.



JOIN THE AI BUSINESS SOCIETY

Workflows like this are exactly what we help you build.

This is the kind of system our members are building every month — with expert guidance, full resource kits, and a community of marketers who actually implement.

Recent trainings cover building agentic workflows, automating ad creative with Claude Code, and creating AI assistants that know your business — all led by practitioners, not theorists. And Michael Stelzner sits in on every session to make sure you walk away with something you can use that week.

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