

FROM ALARM CLOCK TO DOORBELL

THE OLD WAY 🕒

Scheduled Tasks

- Fires at a fixed, pre-set time
- Only knows what time it is
- No context about your business

THE NEW WAY 🔔

Claude Routines

- Fires when a specific event happens
- Understands what is actually occurring
- Runs in the cloud, 24/7

3 COMPONENTS. ONE ROUTINE.

01

INSTRUCTIONS

The job description. Written in plain English, not code. Tells Claude exactly what to do and how to do it.

02

WORKSPACE

A cloud folder of reference materials. Update a doc once — every routine that references it improves automatically.

03

APP ACCESS

The tools Claude is allowed to touch. More access = more capability. Less = more control. Find the balance.

BUILD ANY ROUTINE IN 10 MINUTES

- | | | |
|----|----------------|---|
| 01 | ROLE | "You are my [lead follow-up specialist]" |
| 02 | OUTCOME | "Your job is to [draft a personalized follow-up email within 2 minutes]" |
| 03 | STEPS | Read the submission → Identify the likely need → Draft a short, specific response |
| 04 | OUTPUT | "Post the draft to #sales Slack. Keep it under 100 words." |
| 05 | RULES | "Never send directly. Never use generic templates. Always wait for approval." |

ROUTINES VS. SCHEDULED TASKS

	Scheduled Tasks	Claude Routines
TRIGGER	Time-based. Fires because a time arrived.	Event-based or time-based.
ENVIRONMENT	Runs on your local machine.	Runs in the cloud.
DEPENDENCY	Laptop must be open and awake.	Laptop can be closed. You can be offline.
AUTONOMY	Executes fixed steps. No judgment or decisions.	Fully autonomous. You review the final work.

NOT ZAPIER. NOT N8N.

WORKFLOW BUILDERS

n8n / Zapier

- Draw a strict flowchart
- Every branch must be anticipated in advance
- Breaks when something unexpected happens

"The workflow is the product."

CLAUDE ROUTINES

AI Agent

- Describe the outcome, not the flow
- Claude figures out the how dynamically
- Adapts to the context of each specific event

"Claude is the worker."

DOORBELLS THAT FIRE INSTANTLY

01 NEW LEAD

Reads inquiry, drafts follow-up, posts to Slack for review

02 BAD REVIEW

Identifies complaint, drafts calm public response, flags root issue

03 MISSED CALL

Checks CRM for caller, drafts callback message with context

04 LATE INVOICE

Checks days overdue, adjusts tone, drafts customized reminder

05 CANCELED BOOKING

Reads reason, checks history, drafts personalized reschedule offer

06 CONTACT FORM

Classifies intent, routes to right team, drafts first response

07 NEW CUSTOMER

Matches product, drafts personalized welcome with next steps

08 URGENT TICKET

Reads full thread, identifies real need, suggests resolution

09 ABANDONED CART

Reviews cart, identifies objections, drafts recovery email

10 CANCELLATION

Checks usage history, drafts custom retention offer at moment of decision

ALARM CLOCKS WITH INTELLIGENCE

WEEKDAYS • 7:00 AM

Morning Command Center

Pulls Slack, Gmail, Calendar, Analytics. One brief under 300 words — before your first coffee.

FRIDAYS • 5:00 PM

Weekly Product Brief

Support themes, feature requests, churn signals, key metrics. One document. The pulse of your product.

MONDAYS • 8:00 AM

Competitor Watcher

Scans sites, release notes, pricing pages. Quiet week or a brief on what changed and what it means.

START WITH ONE.

- 1 Pick ONE routine that solves a real bottleneck today
- 2 Write instructions using the 5-part template (Role to Rules)
- 3 Set up the Workspace with your reference docs
- 4 Connect only the App Access you actually need
- 5 Deploy, refine, then expand

"The goal is not to build 13 routines. The goal is to build one that works."