

FIELD GUIDE

partnerwithvivid.com/tools

THE DAILY CLOSE

What it is and how to build your own.

6

JOBS IT RUNS

8

SOURCES IT
READS

1

PAGE EACH
MORNING

2 wks

TO A HABIT

The daily close is an end-of-day assistant that runs when you say "close me out." In one pass it closes out today, gets tomorrow ready, and prints a one-page day brief, so you start the morning with everything in one place.

THE POINT

It is never scheduled. It runs when your day actually ends.

The Daily Close

What It Does

01

Closes today.

It shows what you finished, what you decided, what you owe, what others owe you, and what is still open.

02

Debriefs today's calls.

It reads the full transcript of every call and drafts the follow-up email, the CRM note, the tasks, and the time entries. Nothing is sent or written until you approve.

03

Sweeps decisions.

It catches decisions made in conversations and AI sessions that never got logged, and logs them.

04

Briefs tomorrow's meetings.

Each meeting gets a goal, the history with links, talking points, and questions to ask.

05

Routes tomorrow.

Every task gets a "Run" line that names the skill, project, or "by hand" that will get it done.

06

Prints the day brief.

It builds a black and white PDF with blank space for handwritten notes.

Trigger Phrases

CLOSE ME OUT	Runs the full close.
PREP TODAY	Builds the brief for today, starting from the current time.
BRIEF [MEETING]	Builds the brief for one meeting.
DEBRIEF [NAME]	Debriefs one call.

Where It Pulls From

The close checks every source before it says anything.

Tasks	Task manager: what you closed today, plus what is due tomorrow or overdue. Nothing due later shows up.
Decisions	Decisions log: a list where decisions are captured as they happen.
Email	Email: sent and received mail from today, with calendar noise filtered out.
Calendars	Calendars: every calendar, read fresh for tomorrow's exact date.
Transcripts	Meeting recorder: full transcripts, not summaries, because summaries drop commitments.
CRM	CRM: records and notes from today, plus person-level follow-ups that are due.
Drive	Drive: docs created or edited today.
Web	The web: weather, upcoming holidays, fun national days, headlines, and a quote.

ALSO Yesterday's record: used to show how long open items have been open.

After The PDF

Today's close	The chat shows decisions, commitments, open items, relationship reps, five things you moved, and a closing line.
The approval block	It lists every pending write. Nothing is written until you say yes.

What The Day Brief Contains

**PART
1**

A header with the date and the type of day.

**PART
2**

A quote, then "The world around you" (weather, holidays, birthdays, news, two positive headlines). An optional personal block can follow it, such as an outfit suggestion.

**PART
3**

The agenda, line by line. Fixed blocks (meetings and personal time) and work blocks are laid out in time order. Each task has a checkbox, its bucket, any tag (First, Past due, Due today), and its Run line. Each meeting row carries its full brief inline, so there are no separate prep blocks. Up to three "Needs you first" items open the day. The close itself is scheduled at the end of the workday.

**PART
4**

One box for each of your time buckets, with tasks due that day and generous space to write. A box is left out when nothing is due.

The diagram illustrates the layout of the printed brief. It is divided into four main sections, numbered 1 through 4. Section 1 is the header. Section 2 is the quote and world section. Section 3 is the agenda section. Section 4 consists of three separate boxes, each representing a time bucket.

THE PRINTED BRIEF, IN BLACK AND WHITE

The Outfit

The brief suggests one outfit from your closet inventory, matched to the forecast and calendar: a top, a bottom, a layer if needed, and a backup top. You set the rules, such as new pieces first and no repeated top within two weeks. A short outfit log keeps the rotation honest.

The Build

SKILL FILE

One file that lays out the steps above, with your IDs, lists, and rules filled in.

PDF RENDERING

Claude handles this in its workspace.

HONEST RULE FOR GAPS

If a source fails, the brief says so in one line instead of looking complete.

What You Would Need To Create Your Own

TOOLS

Connected to Claude

A task manager (Vivid uses ClickUp)

A CRM as your system of record (Vivid uses Attio)

Email and calendar (Outlook, Google, or both)

A meeting recorder with transcripts (Vivid uses Granola)

Google Drive or another file store

Web search

STRUCTURES

Set up once

A decisions list in your task manager.

A running doc where each day's close is filed as its own page.

Your time buckets. Vivid uses three: client delivery, creative time, and relationship and visibility work.

A daily working cap in hours, which keeps the brief from overloading a day.

Your CRM relationship fields (how you classify partners, clients, and prospects) and your follow-up cadence for discovery calls.

Optional: a language bank doc that captures your best reframes from calls, word for word.

DECISIONS

Only you can make

When your workday actually starts, and what comes before it.

Which items count as "Needs you first."

Your voice rules for drafted emails.

What should never be written down, such as fees or comments on third parties.

Which personal modules you want: outfit, birthdays, fun days, and so on.

The font and style of the printed brief.

How To Start

STEP

01

Begin with three sources.

Calendar, tasks, and email, plus the printed brief.

STEP

02

Add call debriefs.

Once your recorder is connected.

STEP

03

Add the decisions sweep and the CRM writes.

Then run it every day for two weeks, and change the skill file whenever the brief misses something.