APEX INTELLIGENCE CONNECTIONS CIRCLE

AI Agents *for the Rest of Us*

Past chat. Past search. Into action.

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WHO'S TALKING AT YOU

Hi, I'm Alex.

Software consultant at Applied Visions (AVI).

I help small and mid-sized businesses get real work out of AI — not science projects. The boring kind. The kind that saves you an hour a day or stops you from needing a fifth hire.

Today, three goals:

1. **The vocabulary** — So the jargon stops sounding foreign.
2. **The two tools** — Cowork vs Code — which you actually want.
3. **A real workflow** — Something you'll try Monday morning.

Today's goal: at least one of you tries this on Monday.

— that's the whole pitch.

AN OBSERVATION THAT INCLUDES ME

We're all driving a Ferrari…

…and using it as a cup holder.

(yes, me too, most days)

~10%

of what these tools can do today is the chat box.

The other 90% is agents — and almost nobody's using them yet.

How most people use AI today:

* Smarter Google
* Faster writer
* Email rewording
* Meeting notes

All fine. None of it's the cool part.

THE SHIFT, IN ONE SLIDE

From answer → to act.

2022

Chat

"Write me an email."

2024

Search

"Find the latest on X, then write the email."

2026

Act

"Pull my last 5 tickets, find anything blocked, draft a status update in Word, save it to my folder."

The third one is the new bit. The first two are reruns.

VOCABULARY DUMP

Four words. The whole game.

1

Tools

What AI can DO

2

Connectors

Safe plugs into your apps

3

Skills

Pre-built playbooks

4

Subagents

Junior helpers, in parallel

WORD 1 OF 4

Tools — what AI can DO.

A tool is a verb the AI is allowed to use.

- Read this file.
- Send this email.
- Open this web page.
- Create this calendar event.
- Update this row.

ANALOGY

Without tools:

The friend who can tell you the recipe.

With tools:

The friend who shows up and cooks the meal.

WORD 2 OF 4

Connectors — the safe plugs.

MCP

Model Context Protocol

Think: USB-C for AI.

One standard plug between AI and your apps. Notion, Slack, QuickBooks, Jira, your CRM — each one builds the plug once, and any AI can use it.

Important: you set the scopes. Read-only. One project only. No surprises.

Connectors you probably want first:

- **Notion / Asana / Trello**
  tasks, projects, notes
- **Google Drive / OneDrive**
  find docs, summarize
- **Calendar**
  schedule, prep notes
- **QuickBooks**
  invoices, expenses
- **Slack / Teams**
  summarize threads
- **Your CRM**
  client notes, pipeline

WORD 3 OF 4

Skills — pre-built playbooks.

A skill teaches the AI how to do a specific kind of work — the way an expert would.

Word docs

headings, page numbers, letterhead

Spreadsheets

formulas, formatting, charts

Slide decks

polished, on-brand layouts

PDF forms

fill, extract, merge, split

Calendar mgmt

scheduling, briefings

Your own

consultants and vendors ship skills too

Skills are why your doc looks like a person made it — not like markdown threw up.

WORD 4 OF 4

Subagents — your junior team.

A subagent is a separate AI worker you spin off for one chunk of work.

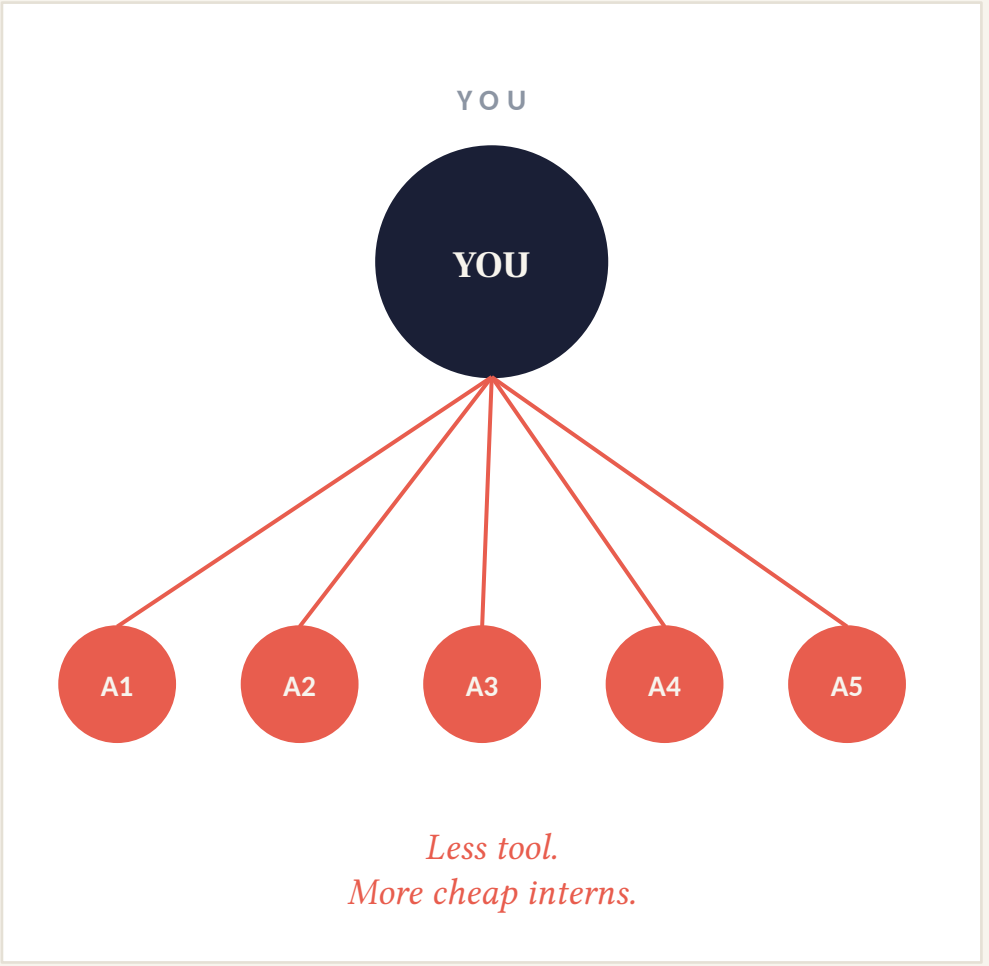
Say: "Research these five competitors. One paragraph each."

WITHOUT subagents

One AI does them one at a time. Long wait. Long messy chat.

WITH subagents

Five workers in parallel. Each returns one paragraph. ~30 seconds.



Less tool.
More cheap interns.

ZOOMING IN ON SUBAGENTS

It's all about context.

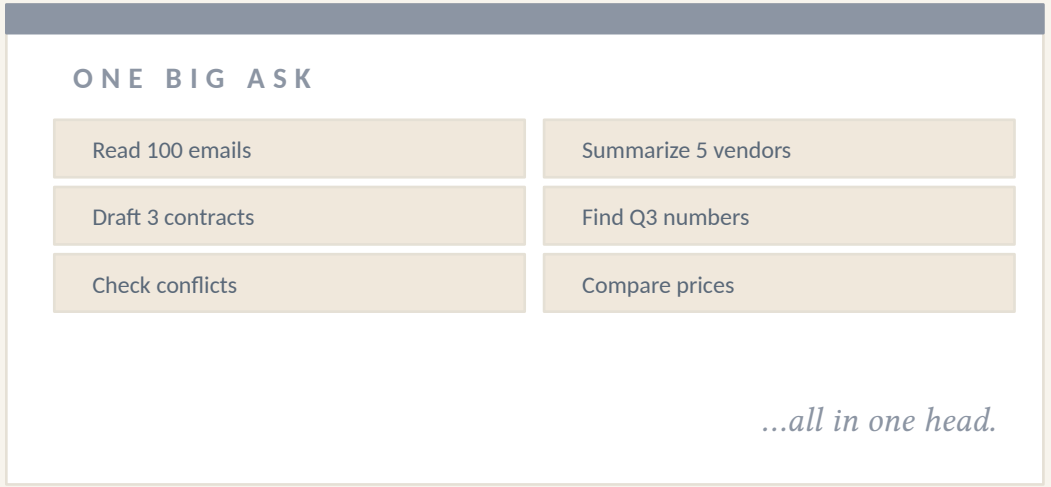
Context = the AI's working memory for a task.

More crammed in → less attention per piece. Fuzzier answers.

Less crammed in → sharper focus. Better answer.

A subagent gives the AI a fresh, narrow context per task. One job, no noise.

Skills do this too. *They bring just the relevant playbook — not the whole library.*





TWO COCKPITS, SAME BRAIN

Claude Cowork vs. Claude Code.

CLAUDE COWORK

FOR

Everyone (especially non-developers)

LIVES IN

Friendly desktop app

BEST AT

Files · docs · business apps · your computer

FEELS LIKE

An executive assistant

← *Most of you.*

CLAUDE CODE

FOR

Developers

LIVES IN

Terminal / IDE

BEST AT

Editing source code · running tests · refactoring

FEELS LIKE

A pair programmer

← *Your dev (if you have one).*

PICK ONE

Which one do you actually want?

Rule of thumb:

Docs, customers, vendors, planning → **Cowork.**

Writing or shipping software → **Code.**

If you're…

- Running a small business
- Sales / customer ops / marketing
- Managing projects or vendors
- Doing finance, ops, HR

pick → **Cowork**

If you're…

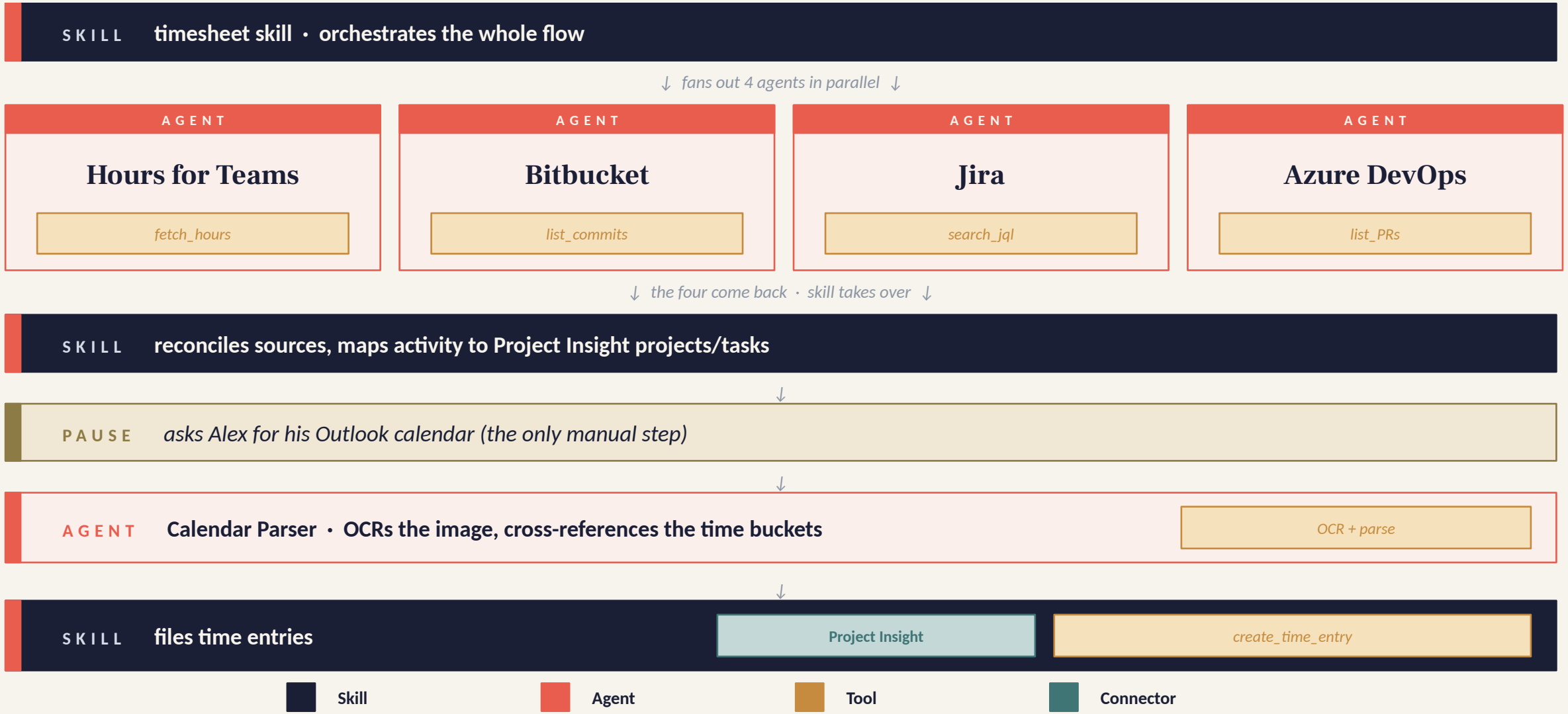
- Building software products
- Maintaining a codebase
- Doing CI / CD work
- An engineer or technical founder

pick → **Code**

LIVE DEMO · WALKING YOU THROUGH IT FIRST

My morning timesheet, mapped.

Runs automatically at 6:30am every weekday. 5 minutes start to submit. Used to take me thirty.



WHAT JUST HAPPENED

All four words, in 90 seconds.

Connector	Gave Claude eyes into a real system of record.
Tools	Let it read, group, summarize, save.
Skill	Made the output look like a real document.
(Subagent)	Optional — if we ran the parallel lookup flex.

No copy/paste. No tab-switching. Two minutes for what would have taken twenty.

AND ONE MORE THING

How do you turn any of this on?

Just ask the agent.

"Do I have a skill for status reports?"

"Set this up as a subagent."

"Which connectors would help here?"

It's just another prompt. *Small focused asks beat big vague ones. That's basically all connectors, skills, and subagents are doing for you.*

WHAT TO TRY

Three prompts for Monday morning.

1

The Status Update

"Pull anything assigned to me in [your tool] this week, group by project, and write me a short Monday status update."

Needs: Cowork + one task tool

2

The Meeting Prep

"Before my call with [client], pull their open tasks, our last notes, and any open invoices. Give me a one-page brief."

Needs: Cowork + your task tool / CRM

3

The Doc Refresh

"Take this messy doc in the folder and turn it into a clean one-pager I can hand to a customer."

Needs: Cowork (no connector needed)

Start with one. Add another after a week.

ONE MORE THING

I made this deck in Cowork.

All of it — slides, speaker notes, the handout — built through a conversation. Here are the actual things I asked for, in order.

1. *"Craft a presentation for my chamber's intelligence round table. Demystify tools, skills, connectors, MCP for everyday users."*
2. *"I do not recommend connecting Claude to your Gmail/Outlook. The blast radius is too high."*
3. *"I want a slide to talk about context. Subagents isolate context into something narrower so we get a better answer."*
4. *"Can we turn this mermaid into a slide (simplified) that I can talk to before I demo my timesheet workflow?"*
5. *"Take the coded names out and use capitalized product names. The calendar agent isn't in the fan-out."*
6. *"The tone seems a little holier-than-thou / smarmy. I'd prefer it light, irreverent, funny."*

*...and then **"add a 'one more thing' slide about how this deck got made."** · Recursion is fun. About 2 hours of conversation, mostly while the dog napped on my feet.*

YOUR TURN

Bring me a workflow.

I'll find the smallest agent that helps.

Alex Thomas

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Grab me at the coffee.