

The LBM AI Field Card

One page. How to get a useful answer out of AI — and how to know when not to trust one.

Think clearer
Act faster
Lead better

Association logo

CARGO — how to ask

Five parts. Leave one out and you get the generic answer everybody complains about.

- C**ontext — who the company is and what is going on. Two-yard dealer, builder-heavy, EWP is our growth line.
- A**ctor — who you want it to be. An experienced LBM credit manager.
- R**equest — the one thing you want done. Rank these past-dues by collection risk.
- G**uardrails — what it must not do. Do not invent figures. Say so if the data will not support a conclusion.
- O**utput — the shape you want back. A table, then three sentences I can send to my GM.

One request at a time. Ask for three things and you get three shallow answers.

SHIFT — how to fix what comes back

The first answer is a draft. Nobody sends a first draft.

- S**implify — make it shorter. Cut what you do not need.
- H**ighlight — pull the key points to the top.
- I**mprove — make it clearer or more practical.
- F**ormat — bullets, steps, a checklist, a text message.
- T**ighten — same meaning, fewer words.

Watch Tighten. It will cut something that had to stay. If the shorter version dropped the delivery date or the terms, that is not a better answer. Shorter is not the goal — usable is.

Build with CARGO. Refine with SHIFT. Two steps. That is the whole method.

The three questions

Every session should end with a decision, not a report.

- 1 What is really going on?
- 2 Does this materially matter?
- 3 What decision moves the business forward?

If you cannot answer the third one when you are done, you did research, not work.

Before you use the answer

- Does it square with what you already know about your yard?
- Can you check the arithmetic yourself in two minutes?
- Did it follow the guardrails, or quietly ignore them?
- Would you be comfortable saying it to a customer or a banker?

Any no — you fix the prompt, not the answer.

Keep what works

The people who stick with this are not better at prompting. They stopped starting over.

- Name and save every prompt that worked. Past-due call list. Lost-quote review.
- Keep them in one place your whole desk can reach.
- When one breaks, fix the prompt and save it again. Do not rewrite it from scratch.
- Hand your best three to the person who sits next to you.

Tell it who you are

Without context, the answer is written for a generic company. That is why most people quit after a week.

Write one short block. Save it. Paste it ahead of the work every time.

What we do and where we operate

Who we sell — builders, remodelers, retail, and the mix

What we are known for

How we make money — the lines that carry us

What season or stretch we are in right now

What we are trying to get better at

What my desk is responsible for

The test: if you could not say it to a customer, it does not go in this version. Date it, and rewrite it when the business changes.

What you can paste depends on where you are working

Not on your title. Check which account you are sitting in before you paste anything.

Approved company workspace

A business or enterprise account your company set up, where your data is not used for training. Your company's normal rules apply — real customers, real vendors, real costs and margins. This is where the finance and pricing work actually pays off.

Personal or free account

Assume anything you paste could be read by someone else. Strip it first: **Builder A, Vendor B, Job 1**. Round the figures or use percentages. You still get the thinking; you just do not hand over the file.

Never in either one: employee pay, reviews, medical or discipline records, customer credit applications, or anything covered by an agreement you did not sign. If you are not sure which account you are in, ask before you paste.

The line you do not cross

AI helps you think it through

Sorting, drafting, summarizing, spotting patterns, arguing the other side, first passes on anything.

A person still decides

Pricing, credit, hiring and firing, vendor terms, safety, anything a customer or a court would see.

When the answer is bad

Almost always one of four things. Fix it in one line and run it again.

- **Too generic** — it does not know who you are. Paste your context block.
- **Confidently wrong** — no guardrail. Tell it what it is not allowed to assume.
- **Too long** — you never told it the shape. Name the format and the length.
- **Answered the wrong question** — you asked for three things at once. Ask for one.

Where to start, by desk

Paste your context block first. Every one of these gets sharper when it knows who you are.

Finance

Rank my past-due accounts by collection risk and tell me which three calls to make today.
Show me what a one-point margin slip on my top ten SKUs costs over a year. Here is last month against the same month last year. Tell me where the money actually went and show your math.

Sales

Here are the quotes we lost last month. Group them by why, and tell me which pattern is fixable.
Draft the follow-up for a builder who quoted three weeks ago and went quiet. Give me five questions to ask on a first call with a remodeler we have never sold.

Operations

Here is a week of delivery exceptions. Find the repeat causes and rank them by cost.
Turn this yard walk-through into a punch list with owners and dates.
Build a cycle-count schedule that hits the fastest movers weekly and everything else quarterly.

HR

Write a posting for an inside salesperson that sounds like our yard, not a corporate HR page.
Build a two-week onboarding plan for a new driver, day by day.

Customer Service

Rewrite this backorder message so the builder knows exactly what happens next.
Take these six complaint notes and tell me what we keep doing wrong.
Draft the call script for telling a builder his truck slipped a day.

Leadership

Argue the other side of the decision I just described, as hard as you can.
Turn these five priorities into one page my managers can act on Monday.

One prompt, written out

This is what CARGO looks like when you actually type it.

You are an experienced LBM credit manager. Here is who we are: [paste your context block].
Below is our past-due list by account, days out, and balance. Rank the accounts by collection risk and tell me the three calls to make today and what to open with on each one.
Do not invent anything that is not in the data. If the list will not support a ranking, say so and tell me what is missing.
Give me a short table, then three sentences I can forward to my GM.

Read the answer, then run one SHIFT pass. Usually Format or Tighten. Then save it with a name.

The 20-minute start

- Write your context block. Once.
- Pick one task you do every week — not the hardest one.
- Run it with CARGO. Refine it with SHIFT.
- Fix the prompt twice, then save it with a name you will recognize.
- Use it again Monday. That is adoption. Everything else is a demo.



Want the long version? The 75-minute session behind this card — worked examples, the full context build, and what to do when it goes wrong — is free. Scan, or go to aigrowthpartners.net/card

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