CANOPY AI FEST NOVEMBER 2026

Improving the Customer Journey

Give AI the brief you'd give a coworker.

Nitish Dhir

prudent digital

INTRODUCTION

I’m Nitish.

Husband and dad to two little boys.

8

years in full-stack development

2019

Media buyer

3

Canopy brands

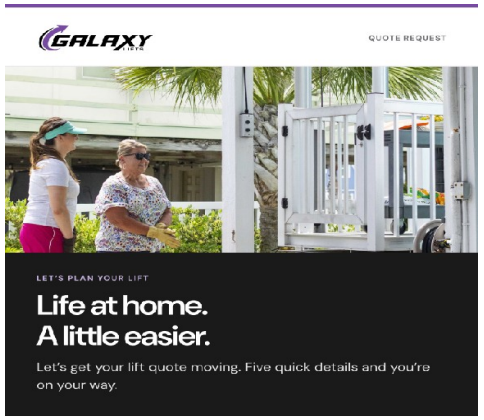
Galaxy Lifts (since 2023)
HySafe
American Muscle Docks

TODAY

One habit. Four examples.

Speak the brief:

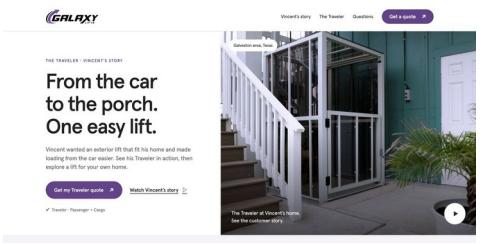
Goal **Context** **Boundaries**



01

Quote emails

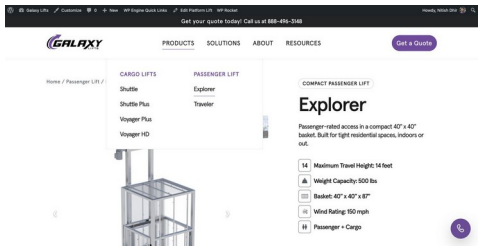
Editable designs



02

Landing page

Built around video ads



03

Website update

Page + menu



04

Match records

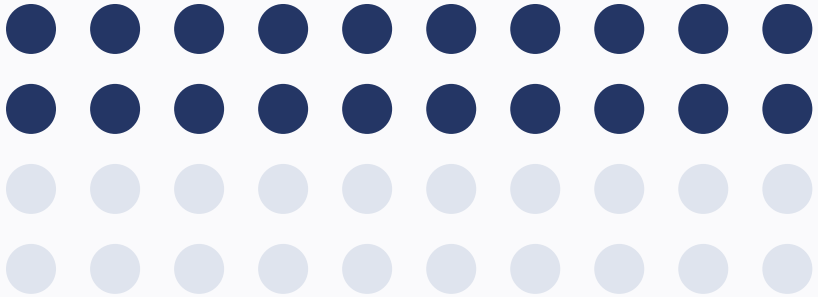
Calls + won deals

THE PROBLEM

Part of the brief is still in your head.

People tapped a familiar song for someone else to identify.

50% **Expected recognition**



The tapper knows the song.

2.5% **Actual recognition**



The listener only hears taps.

You know the background. Make sure AI knows it too.

40 dots represent 100%. Stanford tapping study, 1990.

VOICE INPUT

Speaking helps you explain more of what you need.

TYPED

“Reply to this quote request.”

SAID OUT LOUD

“Reply to this quote request. Thank them, ask for the five details we need to price it, keep it short, and don’t quote a price yet.”

Illustrative business example.

Wharton (2023): spoken search requests were more specific.

VOICE INPUT

One reason to try speaking: speed.

Approximate typing and speaking speeds

Typing

45

words per minute

Speaking

150

words per minute

Use the extra room to explain the goal, context and boundaries.

English-language estimates. Sources: BMJ (typing); Baruch College (speaking).

THE BRIEF

What AI needs to hear from you.

Goal — What I want you to do…

Context — What you can work from…

Boundaries — What you must follow, keep or avoid…

Who it’s for and what good looks like belong in the goal.

THE BRIEF

What AI needs to hear from you.

Goal

What I want you to do…

“Write a short email for my team with the decisions, action items and owners.”

Context

What you can work from…

The meeting transcript or notes.

Boundaries

What you must follow, keep or avoid…

“Don’t invent deadlines or assign work nobody agreed to.”

Example: a meeting summary.

CASE 1 CUSTOMER CONTEXT

Where the emails fit.



One person asks for a quote. The emails help with the next step.

Redesign the emails Galaxy already sends.

Goal

Redesign three automated emails.
Editable in Figma, desktop and mobile.

Context

The emails Galaxy already sends.

Boundaries

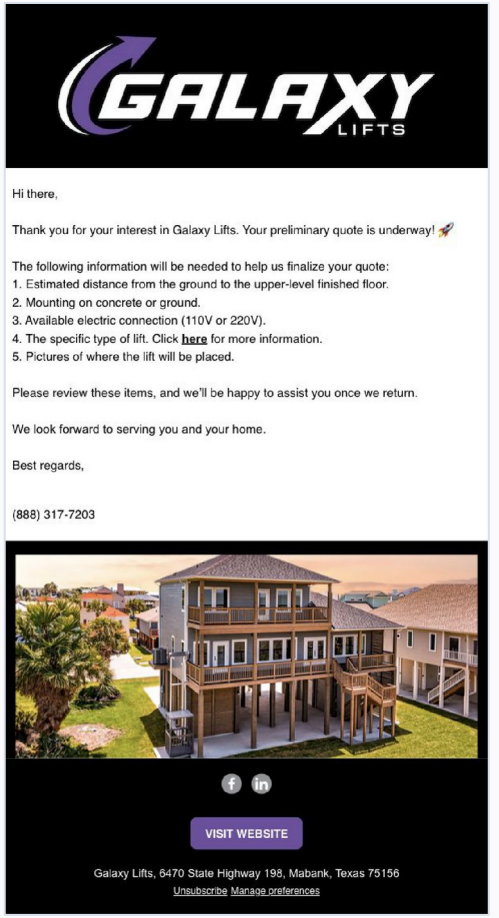
Keep the business asks.
Don’t change HubSpot.

CASE 1 THE STARTING POINT

Galaxy already knew what to ask.

Five details to finish a quote

1. Height to the upper floor
2. Mounting surface
3. Available electrical connection
4. Lift type
5. Photos of the location



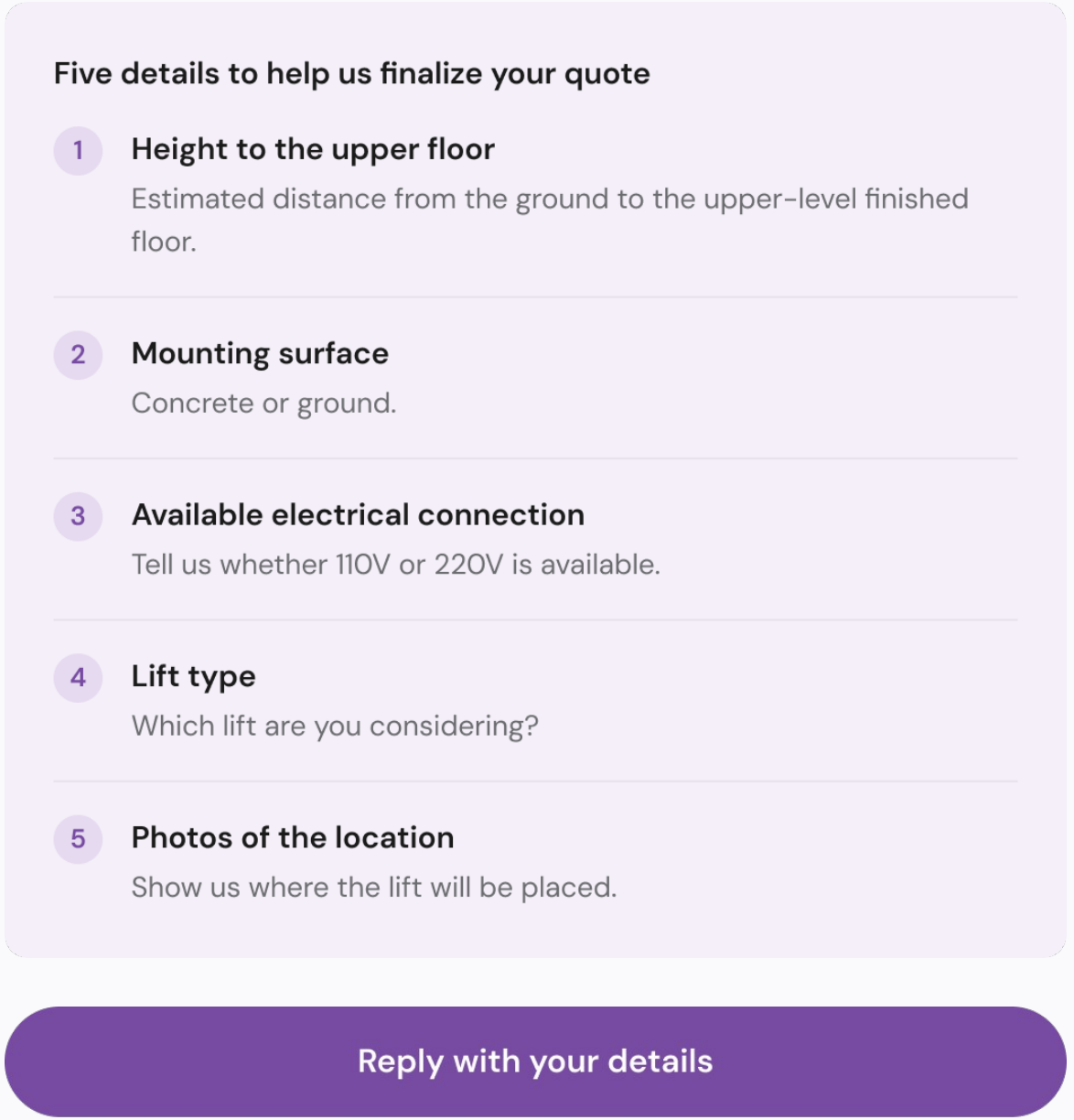
We didn't reinvent the email. We gave it a lift.

Galaxy's current HubSpot email. No customer information.

AI turned it into a checklist.

The same five requests.
Short labels.
One clear reply action.

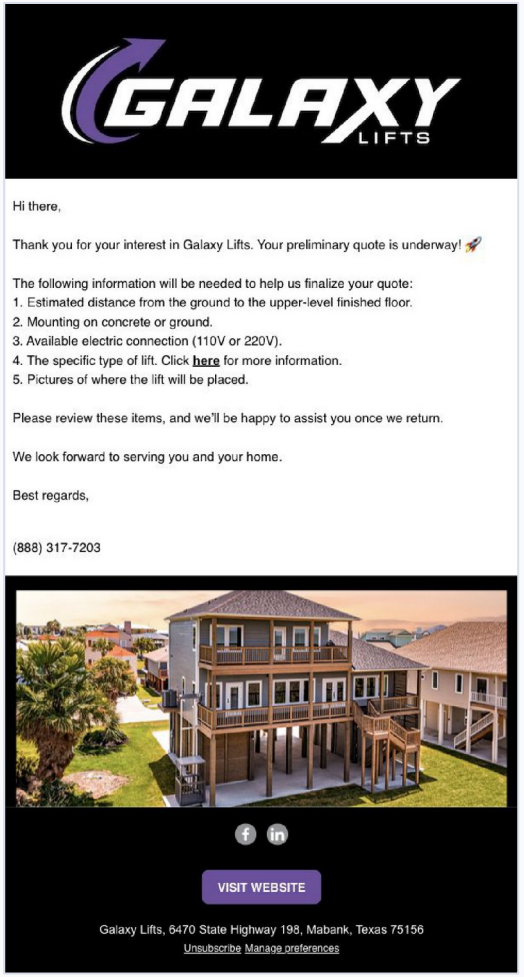
Claude’s Figma design proposal



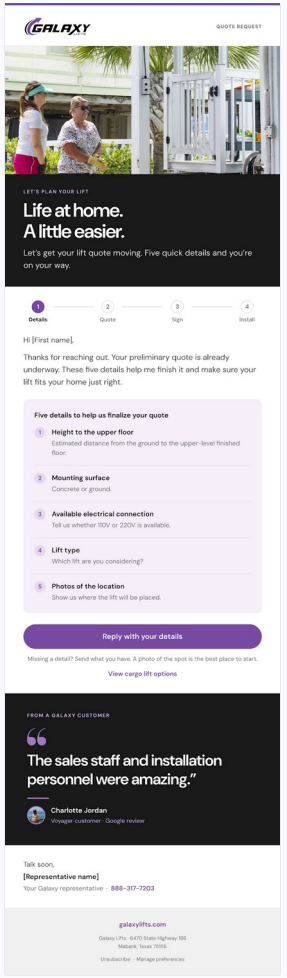
CASE 1 FULL EMAIL

The full quote request email

Before



After

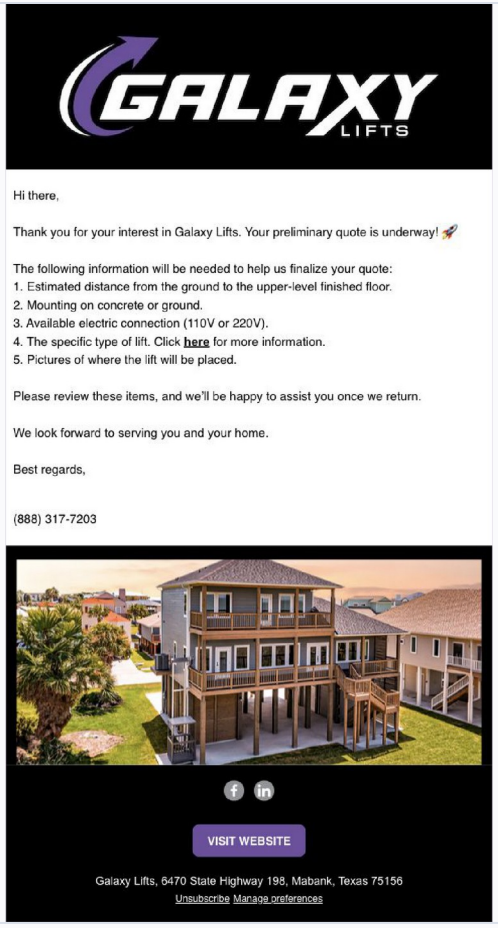


Before: HubSpot email. After: full Draft 4.1 design proposal.

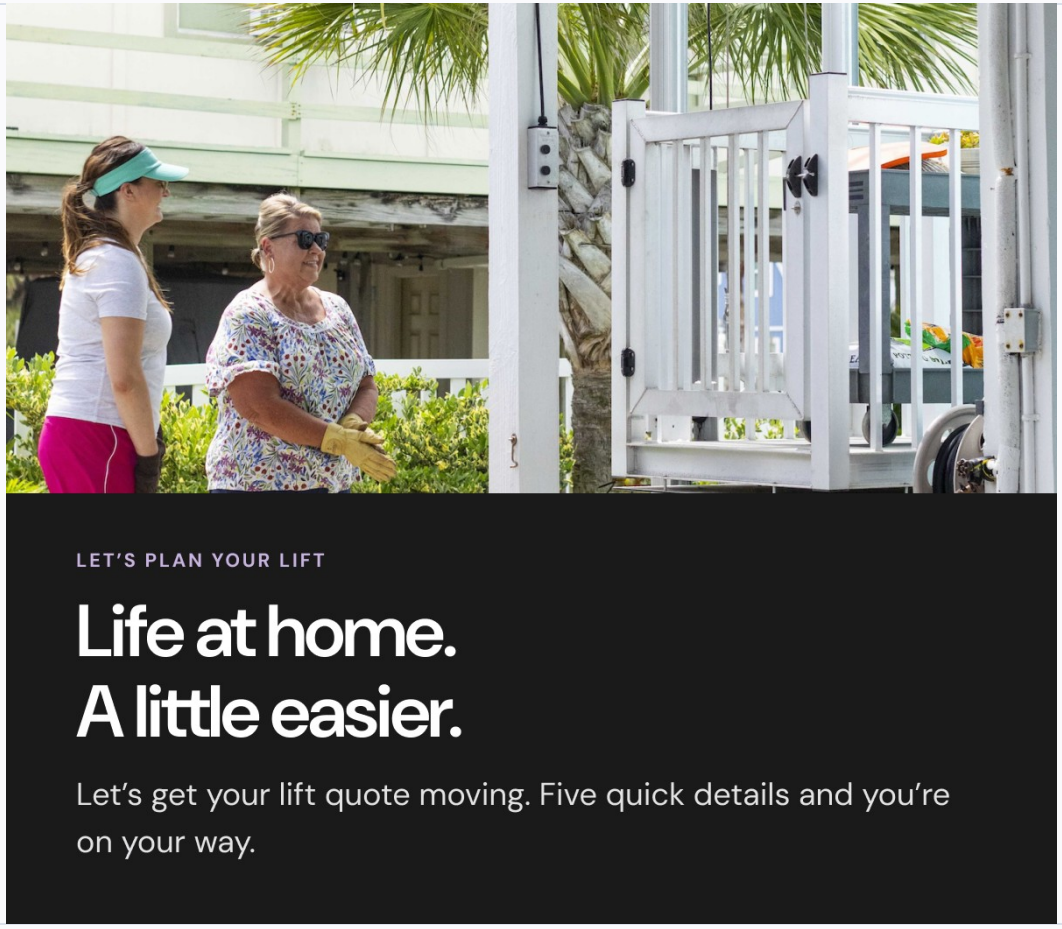
CASE 1 QUOTE REQUEST

Same questions. A warmer opening.

Before



After: opening excerpt

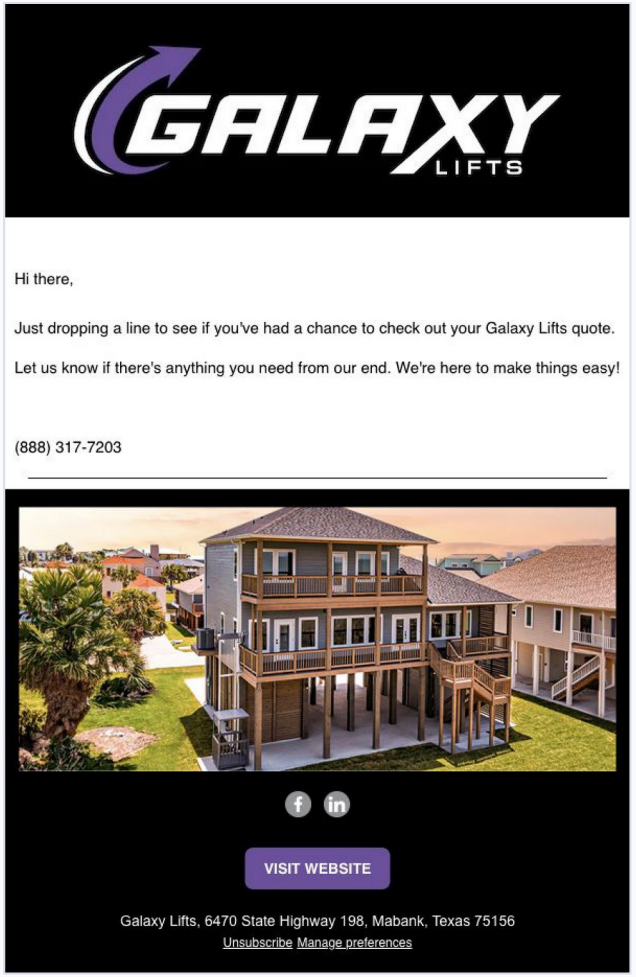


Before: HubSpot email. After: excerpts from the Draft 4.1 design proposal.

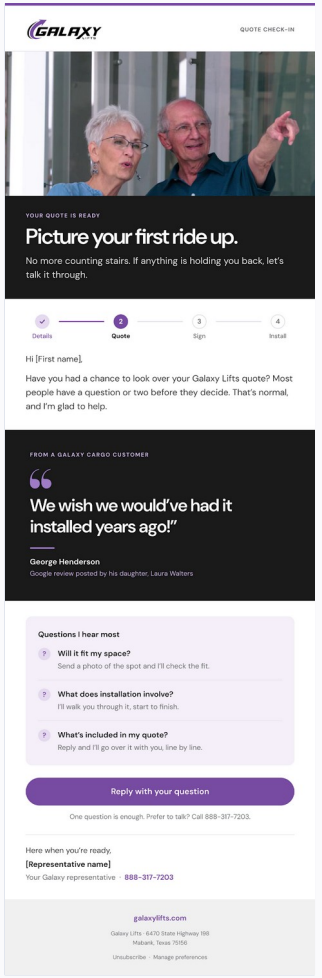
CASE 1 FULL EMAIL

The full quote check-in email

Before



After

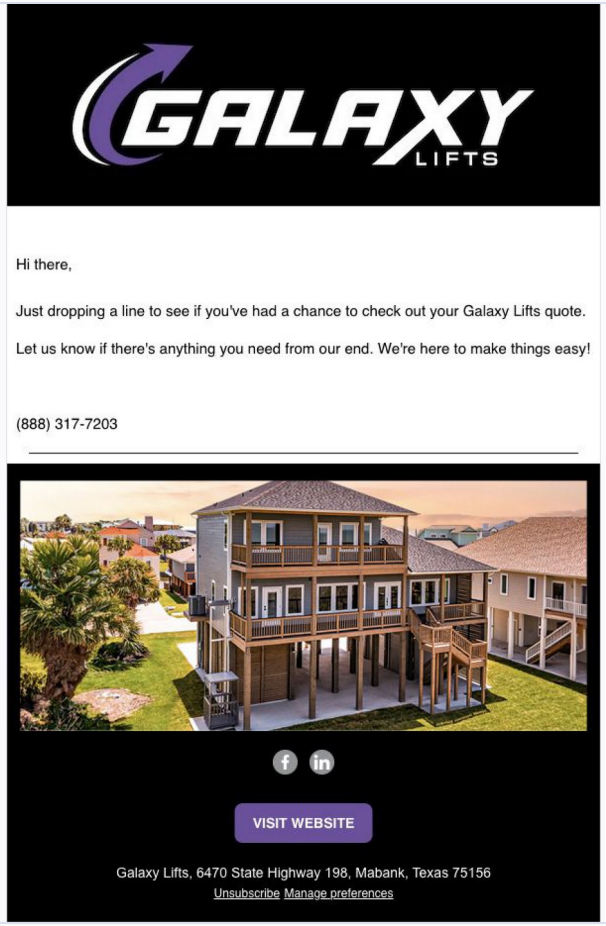


Before: HubSpot email. After: full Draft 4.1 design proposal.

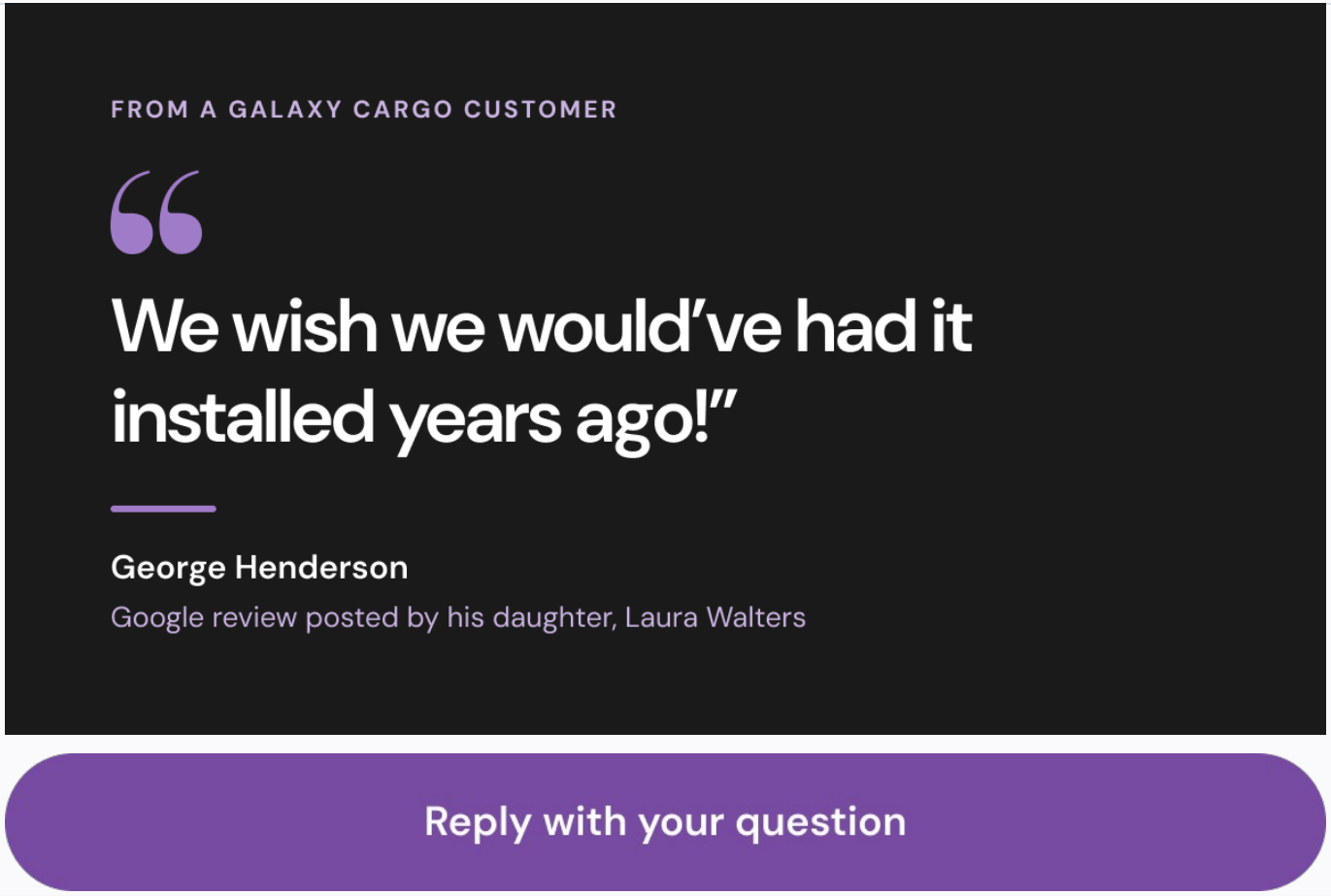
CASE 1 QUOTE CHECK-IN

A check-in with a clear next step.

Before



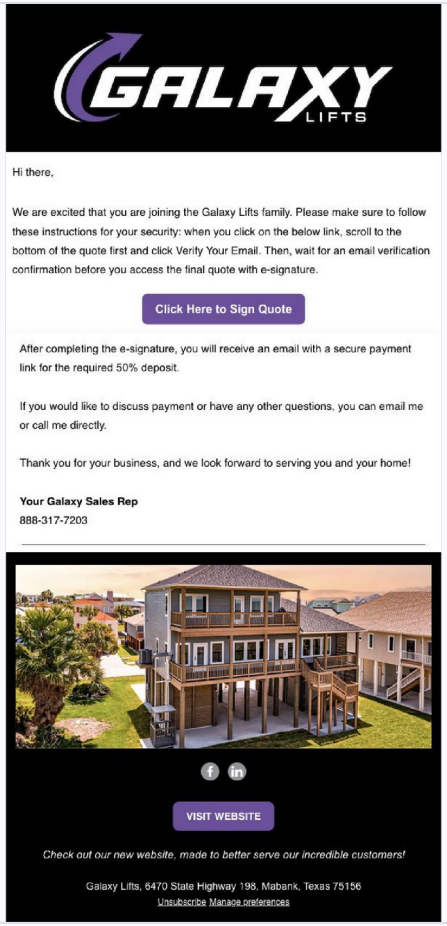
After: review and reply action



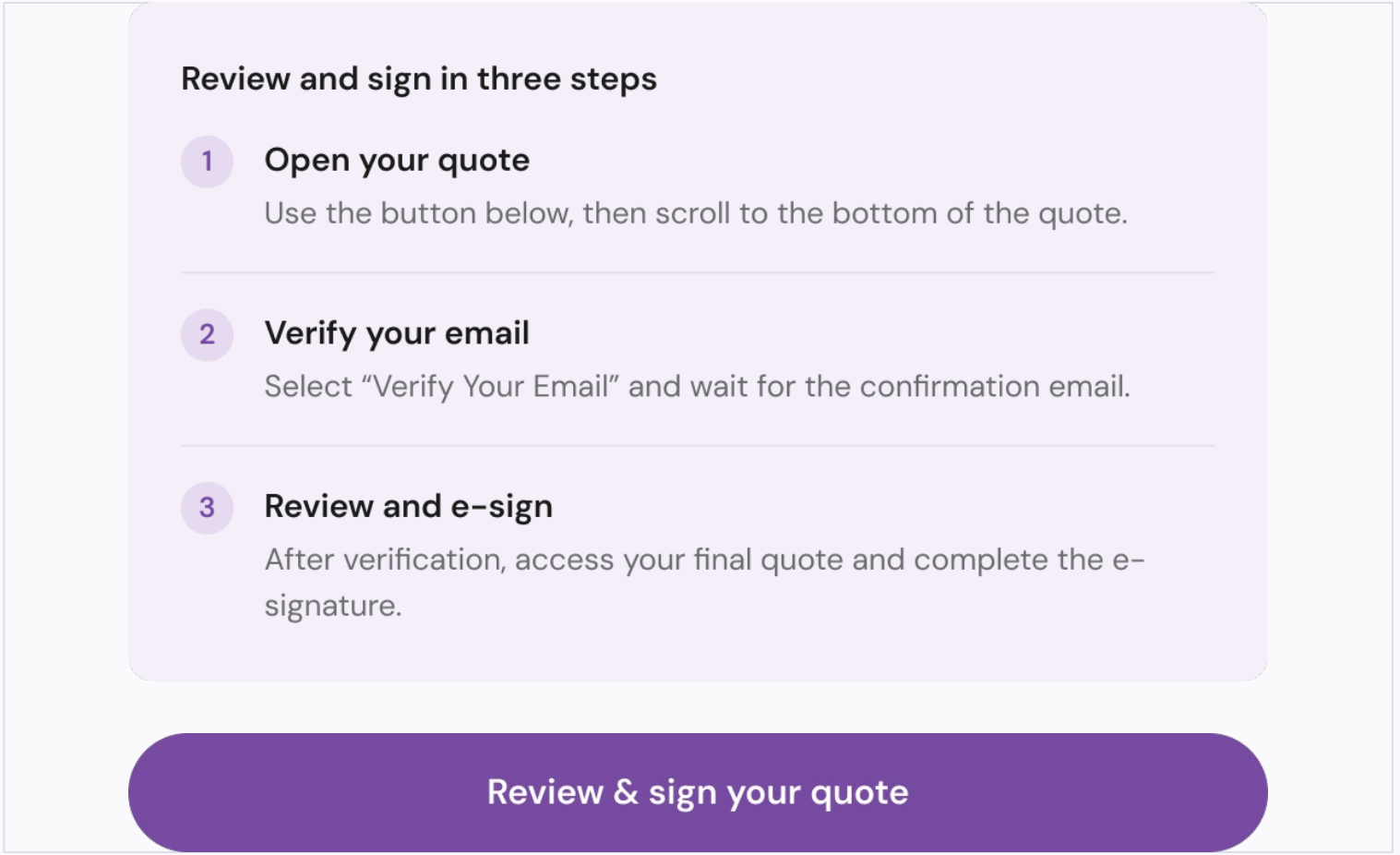
Before: HubSpot email. After: excerpts from the Draft 4.1 design proposal.

Make the signing steps easy to follow.

Before



After: signing steps



Before: HubSpot email. After: excerpts from the Draft 4.1 design proposal.

CASE 1 TRY IT WITH CLAUDE

From an existing email to an editable design.

SOURCE

HubSpot

The existing emails and business asks.

Files or browser access

Claude

Propose the copy, hierarchy and layout.

EDITABLE RESULT

Figma

Desktop and mobile design proposals.

Figma connector

Approve the design before changing HubSpot.

Access depends on your team's setup.

A page built around the video ads.

Goal

“I need a landing page that is very much aligned with the video ad.”

Two versions: Galveston area and the rest of the US.

Context

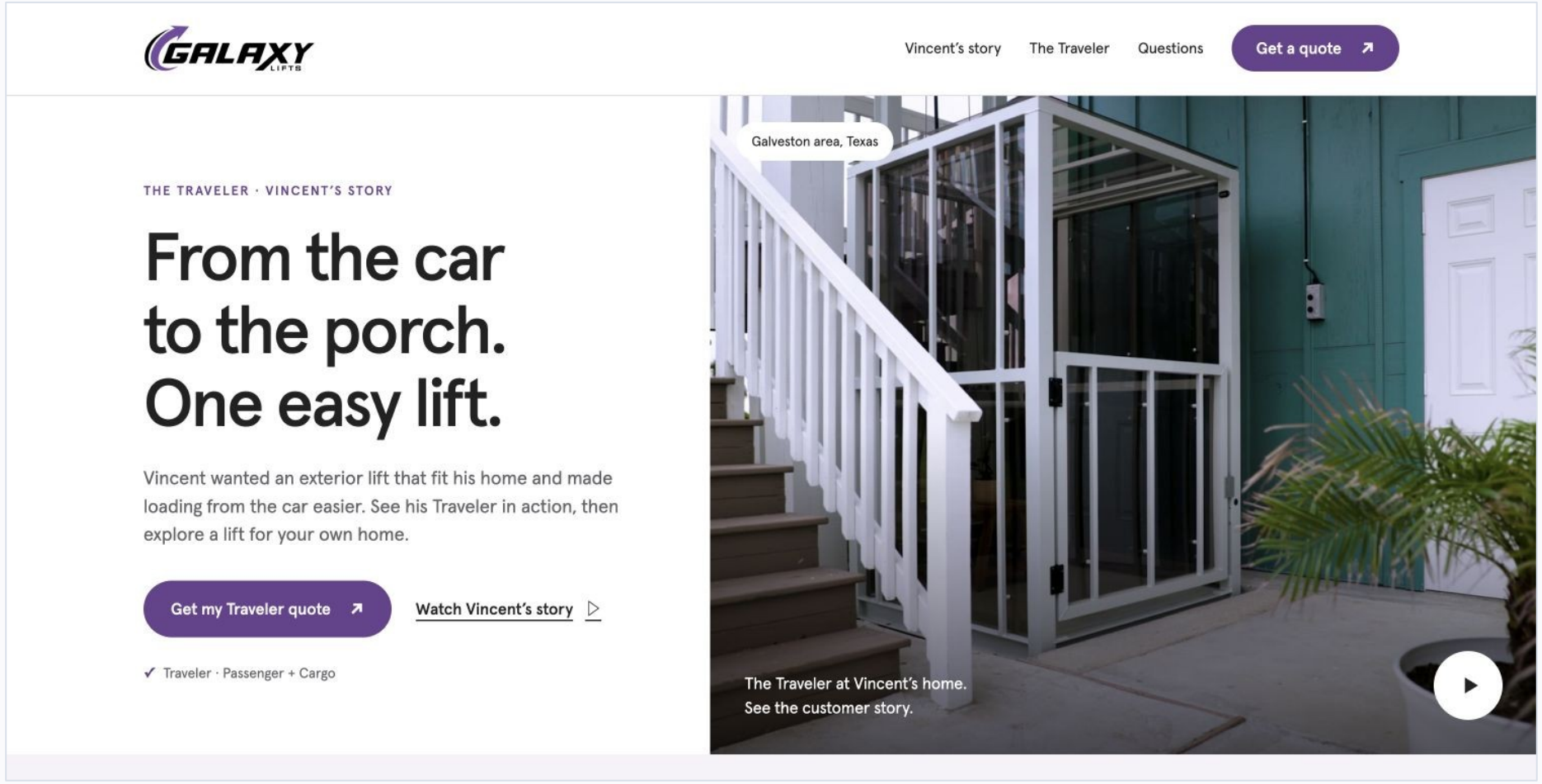
Galaxy’s video ads, its live website and earlier business context.

Boundaries

Build locally first.
Leave the WordPress website unchanged.

Goal quote excerpted from my September 11 request. Other points summarized.

AI built a dedicated landing page.

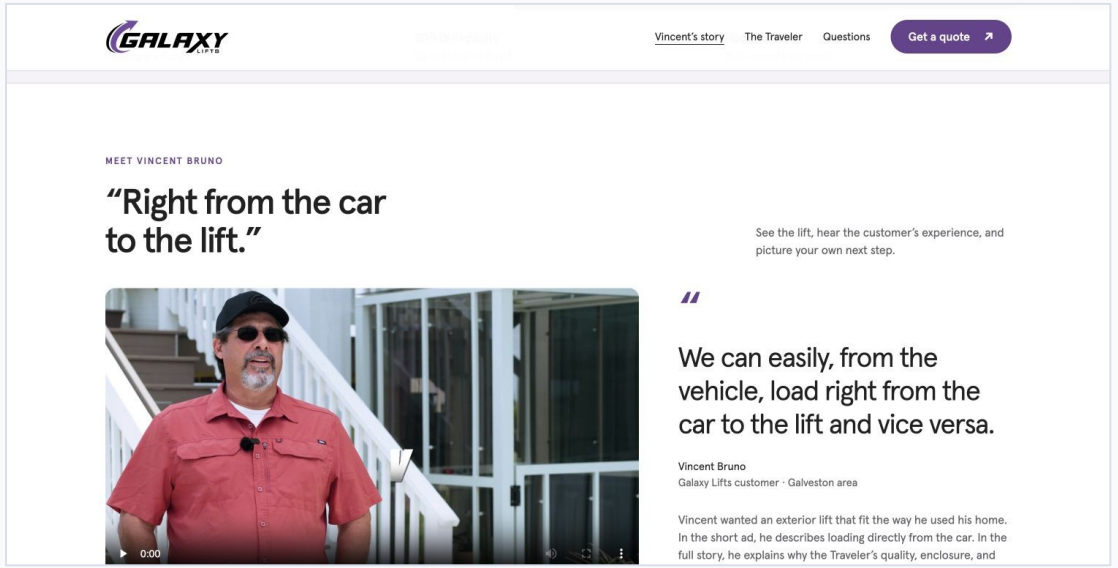


A focused page to continue the experience from the video ads.

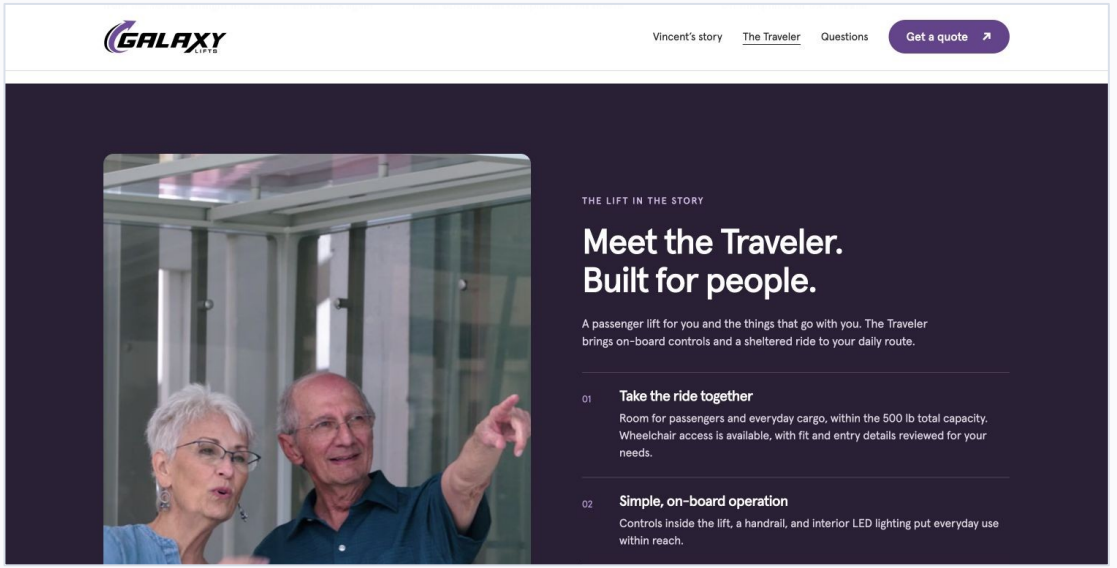
CASE 2 MORE OF THE PAGE

The story carries into the product details.

Customer story



Product details



The page continues the experience introduced in the video ads.

AI handled the launch, too.

traveler.galaxylifts.com

Built the page

Copy, layout and code.

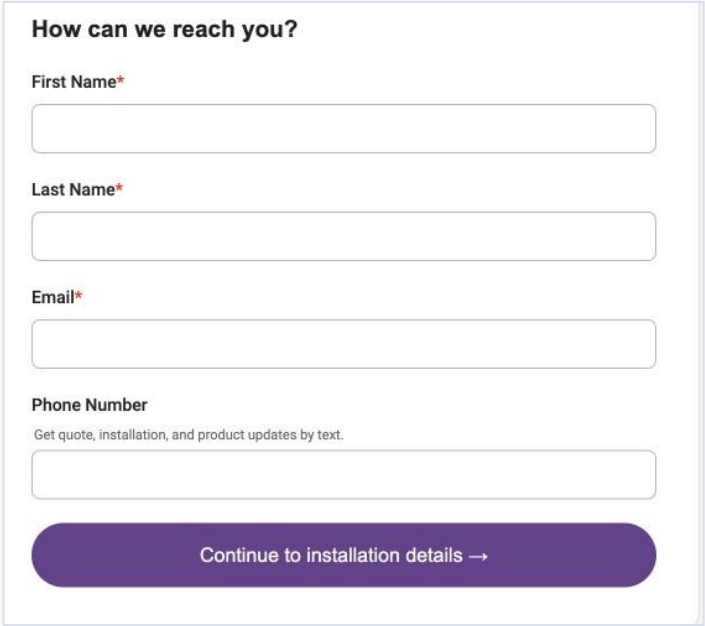
Published it

Cloudflare Pages and the custom subdomain.

Connected it

The existing HubSpot form,
HubSpot tracking and call tracking.

Existing HubSpot form



People supplied the brief, access and review. AI carried out the build and setup.

CASE 2 TRY IT WITH CLAUDE

Build the page. Host it. Connect the form.

SOURCE

Your files

Videos, product facts and the existing site.

Uploaded files and links

Claude

Write the copy, layout and code.

THE PAGE AND ITS CONNECTIONS

Cloudflare Pages

Hosts the landing page.

Hosting account access

ctm Form + tracking

Existing form and approved tracking scripts.

Approved embed code

Keep the main website unchanged. Test lead delivery before launch.

Access depends on your team's setup.

CASE 3 GALAXY WEBSITE

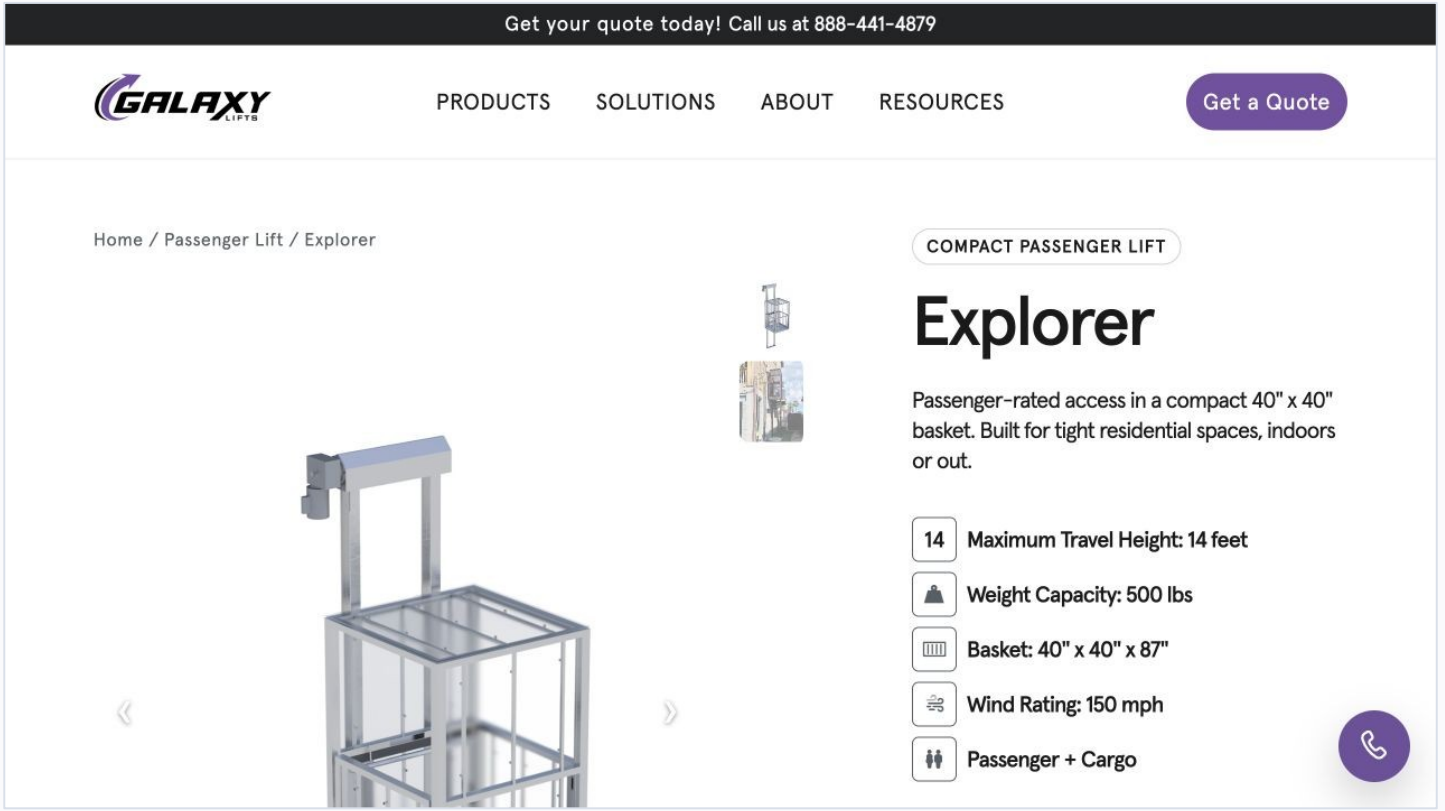
Meeting notes became a product page.

Context supplied

Team call

Email thread

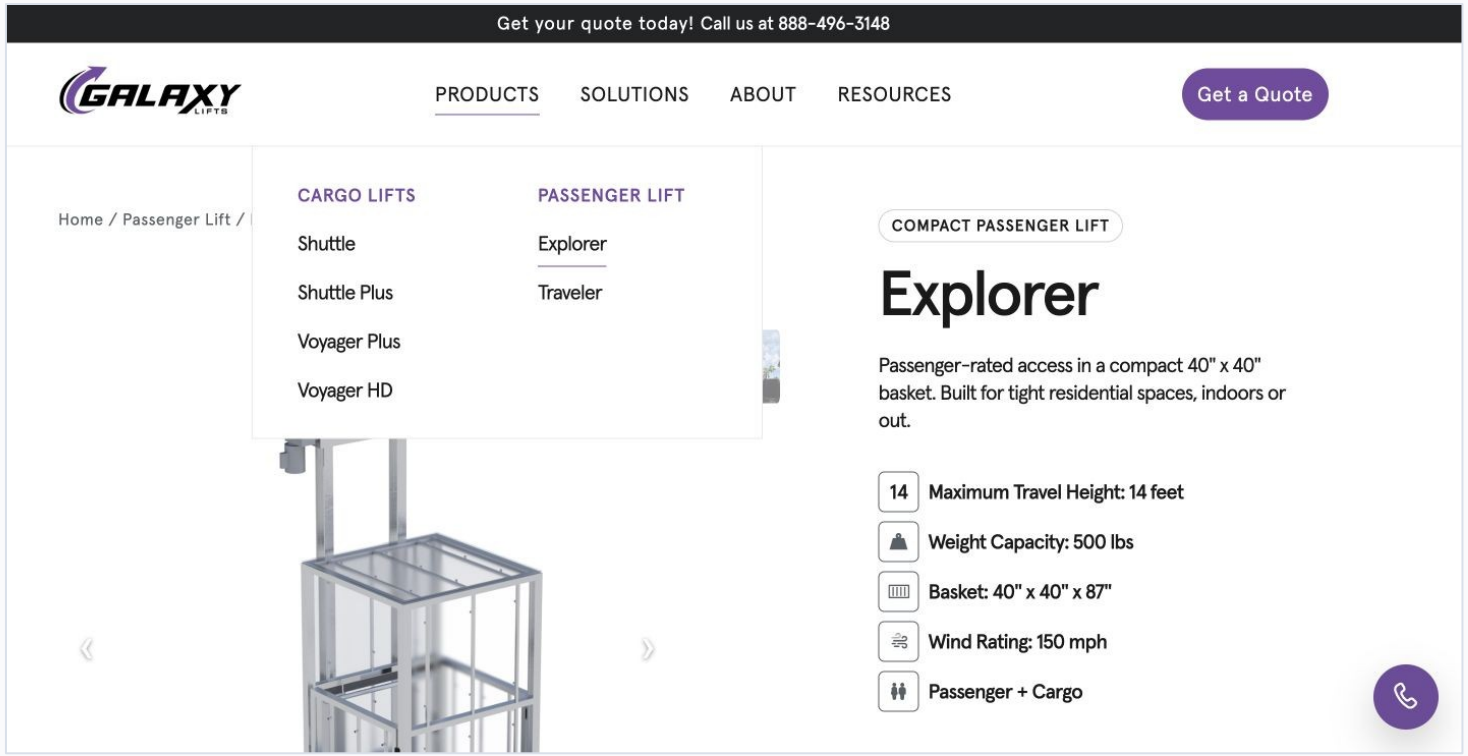
6 product SOPs



Galaxy supplied the specs. AI built the page.

CASE 3 THE LIVE RESULT

AI built the menu I described.



WHAT I ASKED FOR

“Two-column menu”

“Cargo Lifts”

“Passenger Lift”

Galaxy supplied the specs.
AI put them on the page.

Live page captured October 25, 2026. Quotes are excerpts from my August 13 request.

CASE 3 TRY IT WITH CLAUDE

From team knowledge to staging changes.

SOURCE

Team input

Call, email thread and product SOPs.

Uploaded source files

Claude

List the changes. Build in the existing style.

REVIEW BEFORE PUBLISHING

WordPress

Product page and menu in staging.

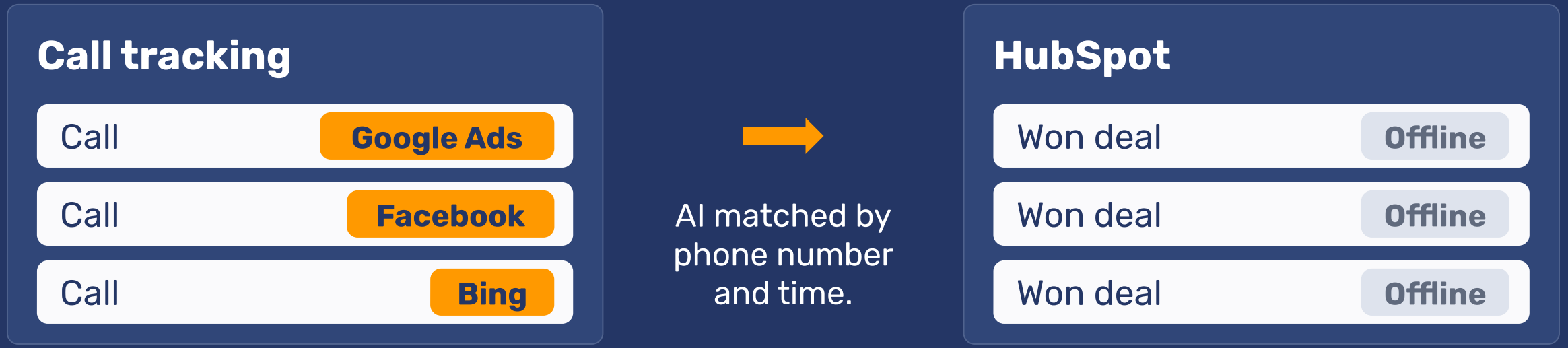
Approved staging access

Product experts check the facts. Review changes in staging.

Access depends on your team's setup.

CASE 4 THE PROBLEM

Too many won deals in HubSpot said “Offline.”



WHAT I ASKED AI • SUMMARIZED

Match calls to won deals. Which “Offline” deals had a paid-source call before closing?

Illustration, not real records.

CASE 4 WHAT AI FOUND

AI found the paid-source matches.

73

“Offline” won deals matched to earlier paid-source calls

$1.05M

in recorded won value across those existing deals

Period: January 1–September 22, 2026.
Phone matches need review.

CASE 4 TRY IT WITH CLAUDE

Two systems. One reviewable match list.

READ-ONLY RECORDS

ctm Calls

Source and time.

Read-only export

HubSpot

Contacts and won deals.

Export or approved access

Claude

Match phone numbers.
Check that the call came first.

REVIEWABLE RESULT

Match list

Each deal, its call and match evidence.

A person reviews matches

Review each match. These are existing won deals.

Access depends on your team's setup.

YOUR WORK

The same brief works outside marketing.

Ideas to try with your own company's context.

Sales

Goal

Prepare for a dealer call.

Context

Last call notes +
the dealer's questions.

Boundaries

Flag missing answers.

Operations

Goal

Find conflicting specs.

Context

Spec sheet +
manual draft.

Boundaries

Don't choose which
one is right.

Customer service

Goal

Draft a customer reply.

Context

Customer question +
warranty policy.

Boundaries

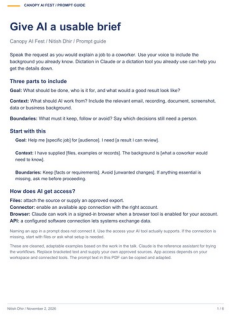
Flag what the policy
doesn't answer.

When I can't judge the answer, I need someone who can.

ONE HABIT TO TAKE BACK

Try speaking your next request.

- Explain the goal.
- Share the context.
- Specify the boundaries.


CANOPY AI FEST / PROMPT GUIDE

Give AI a usable brief

Canopy AI Fest / Nitish Dhiri / Prompt guide

Speak the request as you would explain a job to a coworker. Use your voice to include the background you already know. Dictation in Claude or a dictation tool you already use can help you get the details down.

Three parts to include

Goal: What should be done, who is it for, and what would a good result look like?

Context: What should AI work from? Include the relevant email, recording, document, screenshot, data or business background.

Boundaries: What must it keep, follow or avoid? Say which decisions still need a person.

Start with this

Goal: Help me [specific job] for [audience]. I need [a result I can review].

Context: I have supplied [files, examples or records]. The background is [what a coworker would need to know].

Boundaries: Keep [facts or requirements]. Avoid [unwanted changes]. If anything essential is missing, ask me before proceeding.

How does AI get access?

Files: attach the source or supply an approved export.
Connector: enable an available app connection with the right account.
Browser: Claude can work in a signed-in browser when a browser tool is enabled for your account.
API: a configured software connection lets systems exchange data.

Naming an app in a prompt does not connect it. Use the access your AI tool actually supports. If the connection is missing, start with files or ask what setup is needed.

These are cleaned, adaptable examples based on the work in the talk. Claude is the reference assistant for trying the workflows. Replace [bracketed text] and supply your own approved sources. App access depends on your workspace and connected tools. The prompt text in this PDF can be copied and adapted.

Nitish Dhiri / November 2, 2026

1 / 6

Prompt guide

Examples for four cases.

Scan for the guide

prudent digital