

The Connection Checklist.

Before you plug anything into your AI — the one-pager nobody gives you. Connecting an app to your AI is a hiring decision, not a tech decision. You're deciding what a very fast new employee gets to see, and what it's allowed to *do*. So we do it like a hiring manager, not like accepting cookies.

from the plugs, episode 3. you're allowed to screenshot this.

Connect in this order — the boring order is the right order

- ☐ **1. Email**
The highest-value plug there is. Your inbox is where your whole working life already lives; an AI that can read it stops asking you for context.
- ☐ **2. Calendar**
Cheap to connect, instantly useful. "What's my day," meeting prep, scheduling math.
- ☐ **3. Files & Drive**
Now it can read the documents you are always re-explaining.
- ☐ **4. Notes & meetings**
Granola, Fireflies, Otter. Every call becomes something it remembers so you don't have to.
- ☐ **5. CRM**
If you have one. This is where AI goes from helpful to doing the data entry you've avoided for years.
- ☐ **6. Socials — last**
Least useful context, most sensitive access. Most people never need this plugged in at all.

Why this order. Each step up gives the AI more context about your real life while you build trust in how it behaved with the last one. You wouldn't give a new hire the company card on day one.

The never-plug-in list — hard nos, no exceptions

- × **Your bank, or anything that moves money.** AI can help you think about money all day. It does not get the keys.
- × **Your password manager.** Nothing gets the keys to everything else. Ever.
- × **Accounts that aren't yours to connect** — a shared team login, your spouse's email, your boss's calendar.
- × **Anything you're legally on the hook to protect** — patient data, student records — not without your compliance person in the room.

The five questions before you click Allow — every time, thirty seconds

☐ **1. Which account am I connecting?**

Work email or personal? The number-one mess people make is plugging in the wrong one and then wondering why the AI "can't find" anything. Ask me how I know.

☐ **2. Can it only read, or can it also do?**

Reading your inbox is one thing. *Sending* from it is another. Look for the words: read, draft, send, delete. Draft-only is the setting you want until trust is earned — the AI writes, you hit send.

☐ **3. What's the most embarrassing thing in there?**

Not a joke — an actual check. If the folder contains your medical records, your salary negotiation, or your friend's secrets, connect a different, cleaner folder instead. Make a "Claude works here" folder and keep the AI in its office.

☐ **4. Whose data is in there besides mine?**

Client files, other people's information, your company's material. If it isn't yours alone, think one extra beat — and if it's your employer's, ask what's allowed before, not after.

☐ **5. Do I know how to unplug it?**

Find the disconnect button *before* you connect. Every legitimate tool has one. If you can't find it, that's your answer.

What to expect the first time — so you don't panic

- **The first session is a get-to-know-you.** Ask it something it could only answer with the new connection: "what's sitting in my inbox from this week that needs a reply?" That's the test that the plug works.
- **It sees a snapshot, not your soul.** Connecting doesn't mean it's always watching. It looks when you ask it to work.
- **When it says it can't find something, it's almost always question one** — wrong account connected. Check that before you decide the whole thing is broken.
- **You will feel a little weird the first time it summarizes your inbox.** That's normal. The weird fades the first time it catches something you'd have missed.

Next in the plugs: what plugs into what — the compatibility chart nobody publishes. Saved in the plugs highlight when you're ready.