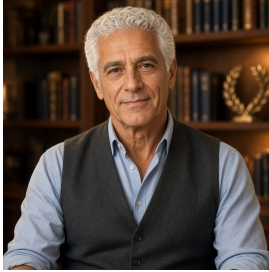


Marcus Owner Guide



AI-generated image. Marcus is an AI assistant, not a real person.

From Agentic Solutions (agenticsolutions.biz). Plain steps for home services and small business owners.

Marcus is an AI business advisor that runs inside your own Grok Bot account. He helps you look at every critical area of your business each week, helps you think through decisions, and offers AI shortcuts where they actually help.

This guide covers:

1. What you need before you start
2. Getting a Grok account and Grok Bot
3. Adding Marcus from the link
4. Your first conversation
5. The weekly rhythm
6. First-week prompts
7. Connecting email and calendar (optional)
8. Safe AI rules
9. When something goes wrong
10. Where to get more help

About the picture of Marcus: it is an AI-generated image. Marcus is an AI assistant, not a real person.

1. What you need before you start

- ☐ **A Grok account and a plan that includes Grok Bot.** Grok Bot is a paid product. See Section 2.
- ☐ **A computer or phone** where you can install the Grok Bot app.
- ☐ **The Marcus link** from agenticsolutions.biz/marcus: [MARCUS_TEMPLATE_LINK]

- ❑ **20 minutes** for setup and your first conversation.
- ❑ **One real problem** you'd like help with this week. It doesn't have to be big.

You do **not** need to connect email, calendar, or any business software to start. You can add those later, or never.

2. Getting a Grok account and Grok Bot

Grok Bot is made and billed by its provider, not by Agentic Solutions. Plans and prices change, so **check current plans at the official site before you pay** (start at x.ai/bot).

When this guide was written (October 21, 2026), the official Grok Bot documentation said:

- Grok Bot is included with eligible paid plans, and an individual SuperGrok, SuperGrok Plus, or SuperGrok Heavy subscription can be linked to get access.
- Grok Bot runs on Mac, Windows, Linux, iPhone, iPad, and Android.
- Use resets weekly. If you use up your plan's share for the week, your Bots may pause until it resets.

The steps:

1. **Get a Grok account** and choose a plan that includes Grok Bot. Check the official site for which plans qualify today.
2. **Download the Grok Bot app** from the official downloads page (x.ai/bot) for your computer, or from your phone's app store.
3. **Sign in.** Choose **Sign in** and finish signing in in the browser window that opens.
4. **Link your Grok subscription if the app asks.** On a phone, the access screen offers **Link Grok Account**. On a computer, look under **Settings, Usage & Billing**.
5. **Let the app finish its first-time setup.** It sets up a cloud computer for your Bots in the background. That's normal.

Tip: Only download the app from the official site or your phone's official app store.

3. Adding Marcus from the link

Marcus is shared as a Grok Bot *template*. Adding him makes your own copy on your own account.

1. Open the Marcus link: **[MARCUS_TEMPLATE_LINK]**

2. A preview page opens on x.ai. It shows Marcus's description, his skills, and any routines. Read it.
3. Choose **Add to Grok Bot**.
4. The Grok Bot app opens and shows what Marcus includes. Look it over, then confirm to add him.
5. Marcus now appears in your list of Bots.

What you get: Marcus's instructions, skills, and avatar. **What you don't get:** anyone else's logins, files, or conversations. Your conversations with Marcus stay on your account.

Shared templates are made by other users, not by the Grok Bot provider. Adding one accepts the provider's terms for third-party bots, so read the preview first.

Updates. If we improve Marcus, you may need to add him again from a new link.
[CONFIRM: how owners will be told about updates]

4. Your first conversation

Open Marcus and type:

Hi Marcus, let's get started.

He'll ask a few questions, one at a time:

1. What to call you, your trade, and the size of your operation (trucks, crews, office staff).
2. The one thing keeping you up at night right now. If you bring a real problem, he'll skip the rest of setup and start helping.
3. How you want your weekly check-ins: formal meetings or short daily prompts.
4. Whether you'd like to connect your email and calendar. This is optional.

Marcus remembers your answers, so you don't have to repeat yourself. If something changes, like a new hire or a new service, just tell him.

How to get good answers: Give him real details. "Collections are slow" gets a general answer. "Four invoices are over 45 days, all insurance jobs, all waiting on the same paperwork" gets a useful one. Use round numbers if you'd rather not share exact figures.

5. The weekly rhythm: the Management Meeting Cycle

Marcus is built around a five-day cycle so each critical area of the business gets attention every week.

Day	Focus	Questions Marcus will ask
Monday	Planning	What must get done this week? Who owns each item? What could get in the way?
Tuesday	Work in progress and issues	Where does every open job stand? What's stuck, and what is it waiting on? What needs a decision?
Wednesday	Financials	What's cash looking like? What's past due? Which jobs are over budget?
Thursday	Field and quality	Any callbacks, rework, or safety concerns? What did a customer notice that we didn't?
Friday	People, customers, and partners	Who's overloaded? Who's ready for more? Any customer, sub, vendor, or referral partner who needs a call?

Two ways to run it:

- **Short prompts.** Marcus sends you a few questions each day at a time you choose. You answer in a few minutes, by typing or by voice.
- **Formal meetings.** You hold a short meeting with your team each day. Marcus helps you prepare the agenda beforehand and sort the notes afterward.

Start with whichever feels easier. Most owners can change it later with one sentence:

"Marcus, switch Wednesdays to a formal meeting at 8 a.m."

6. First-week prompts

Copy these into your chat with Marcus. Change the details to fit your business.

Monday (planning) > Here's what's on my plate this week: [list]. Help me sort it into must-do, should-do, and can-wait, and tell me what I should hand off.

Tuesday (work in progress) > Here are my open jobs and what each one is waiting on: [list]. Which one is the real bottleneck, and what's one thing I can do today to move it?

Wednesday (financials) > My receivables are about [amount], and the oldest invoices are [describe]. Help me figure out why they're slow and give me a manual fix and an AI option.

Thursday (field and quality) > We had a callback on [describe]. Help me find the root cause and write a short checklist so it doesn't happen again.

Friday (people, customers, partners) > My crew lead seems stretched thin. Ask me questions to figure out what's really going on, then give me two or three things to try next week.

Anytime (bringing AI into the business) > I want to try AI on one part of my business. Ask me how a job moves from the first call to the final payment, then help me pick the one step where AI would help most. Keep it small.

Anytime (a decision) > I'm deciding whether to [hire / buy a truck / add a service / drop a customer]. Ask me what you need to know, then lay out the options and the trade-offs. Don't decide for me.

7. Connecting email and calendar (optional)

If you connect your email and calendar to your Grok Bot account, Marcus can help with routine work: drafting replies, sorting what needs you, and preparing appointments.

1. In the Grok Bot app, open **Connect apps** from the sidebar.
2. Find your email or calendar app. Choose **Add**.
3. Sign in yourself in the browser window that opens. Never type a password into the chat.
4. Tell Marcus what he's allowed to help with. For example: *"Draft replies to scheduling emails, but don't touch anything from my bank or my accountant."*

The rule: Marcus drafts and prepares on his own. **Every email he would send and every booking he would make waits for your OK.** Read each one before you approve it.

Connectors are account-wide. If you add other Bots later, they can use the same connections.

8. Safe AI rules

These are the same rules I use with my own AI assistants.

1. **Never give Marcus passwords, bank details, card numbers, or Social Security numbers.** If an app needs you to sign in, do it yourself in the sign-in window. If Marcus ever asks for a password in the chat, say no.
 2. **Review anything before it's sent.** Emails, texts, invites, and posts. You are the one sending it.
 3. **Check important facts.** Marcus can be wrong. Ask him where a number or claim came from. If he can't say, treat it as a guess.
 4. **Keep customer privacy in mind.** Share only what he needs. Use first names or job numbers instead of full customer details when you can.
 5. **No legal, tax, or pricing calls.** Marcus can help you prepare questions for your attorney or accountant. He won't give legal or tax advice, and the prices you charge are your decision.
 6. **Money stays with you.** Don't let any AI assistant pay bills, move money, or approve spending.
 7. **Start small and earn trust.** Give Marcus one routine job, watch how he does for a few weeks, then add the next one.
 8. **Keep a human accountable.** Marcus helps with the work. You own the result.
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9. When something goes wrong

Marcus stopped answering partway through the week. Your plan includes a set amount of use each week. If it runs out, your Bots may pause until it resets. Check your plan in the Grok Bot app.

Marcus forgot something about my business. Tell him again, plainly: *"Remember that we have four crews now, not three."*

The advice doesn't fit my shop. Say so. *"That won't work here because [reason]."* He'll adjust.

A connected app stopped working. Open **Connect apps** and sign in again.

Grok Bot account or billing questions go to the Grok Bot provider, since they run and bill the service.

10. Where to get more help

Everything on agenticsolutions.biz is written for home services owners and managers, in plain words.

- **Free course:** *Your First AI Build, Scope First* at agenticsolutions.biz/course/first-build. Plan one small AI build before you start it.
- **AI Readiness Scorecard:** agenticsolutions.biz/scorecard
- **Process Mapping Worksheet:** on the home page, under Free and Low-Cost Resources.
- **Free tool guides:** agenticsolutions.biz/resources
- **Main Street AI Brief:** a free weekly email with what's new in AI and what it might mean for your business. agenticsolutions.biz/brief
- **Books:** agenticsolutions.biz/books. *Rethinking Business in the Age of AI* is the one I point people to first.
- **Contact:** agenticsolutions.biz/contact

Marcus is an AI assistant and makes mistakes. He gives general business information, not legal, tax, or financial advice. Grok Bot plans, prices, and screens can change; check the official site. Written October 21, 2026.