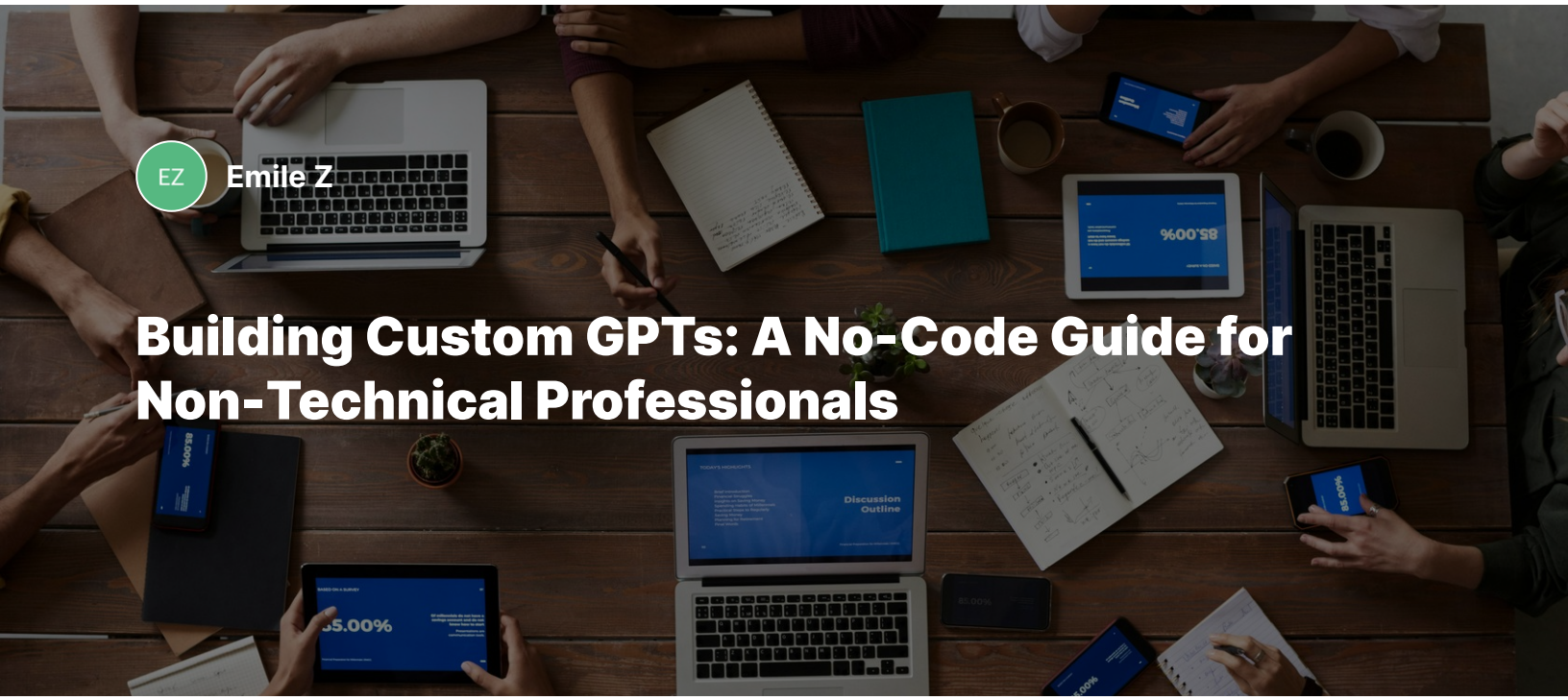


Man typing on ChatGPT

Build an AI Assistant That Actually Gets You

Are you still copy-pasting the same prompts into ChatGPT every morning? **It's time to stop**. In this course, you'll learn how to package your specific way of working into a **Custom GPT** that handles your heavy lifting automatically.

In this lesson, you will:

1. **Conduct a Workflow Audit:** Evaluate your daily tasks to identify high-impact, repetitive processes ideal for automation.
2. **Apply the OCTR Prompting Framework:** Master the Objective, Context, Task, and Rules structure to write better prompts.
3. **Deploy a Functional Prototype:** Build and validate a working custom GPT based on a real-world meeting notes use case.

CONTINUE

What is a Custom GPT?

A **custom GPT** is a tailored version of **ChatGPT** that you configure for a specific job. You decide what role it plays, what information it should use, and what kind of outputs it should create.

Other AI platforms offer similar tools. For example, Gemini has **Gems**, and Claude supports custom assistant **Skills.** In this course, we'll use **Custom GPT** from OpenAI.

OpenAI's custom GPTs are not fully autonomous agents, but they do show **agentic behavior**. They can reason within clear boundaries, follow a defined process, and adapt their responses based on the information and instructions you provide.

CONTINUE

When to Deploy a Custom GPT?

For ad-hoc questions or quick brainstorming, a normal ChatGPT conversation is usually enough. When the workflow requires specific expertise, consistency, and repeatability, it is worth turning it into a custom GPT.

A custom GPT is most useful when you want to:

1. **Automate repetitive and high-volume tasks** to save time
2. **Scale team processes** by standardizing steps and quality
3. **Apply niche knowledge** that a general AI wouldn't naturally possess

CONTINUE

Knowledge Check:

Sort the following professional workflows into the most efficient tool category

Use Standard ChatGPT

Drafting a one-off "Thank You" email.

Brainstorming three names for a new project.

Asking for a quick summary of a public news article every day

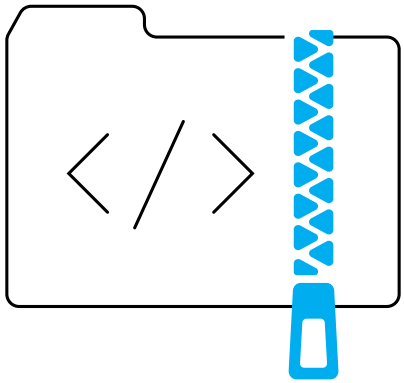
Build a Custom GPT

Applying internal company policy rules to every document draft

Processing weekly client intake forms using a set template.

Ensuring all team social media posts follow a specific brand voice.

CONTINUE



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CONTINUE

Three steps to building a custom GPT

Behind every effective custom GPT is a three-step process.

You **Prepare** the job, **Prompt** the model with clear instructions, then **Test and iterate** until it behaves reliably.

Therefore, you create a **PPT**

Step 2

PREPARE

Before you open the builder, define the job.

Ask yourself:

- What problem should this GPT solve, and for whom?
- What kind of outputs do we need (summaries, ideas, drafts, reports)?
- What knowledge or examples does it need to see?

A good **Prepare** step gives you a clear, focused use case instead of a vague “do everything” assistant.

Step 3

PROMPT

Next, translate the job into a system prompt using a simple structure.

You'll define:

- The GPT's role and goal
- The environment and constraints it works in
- The step-by-step process it should follow
- The boundaries and quality standards

Together, these become the "script" your GPT follows every time.

Step 4

TEST & ITERATE

Finally, try your GPT with real examples.

- Does it follow the steps you defined?
- Does it respect the rules?
- Is anything missing or unclear?

Use what you see to refine the instructions and test again. Repeat this loop until the GPT is predictable and reliable.

CONTINUE

A simple structure for your prompt

To design the **Prompt** step, we'll use a four-part structure:

Objective – Context – Task – Rules (OCTR)

OBJECTIVE	CONTEXT	TASK	RULES

The Objective tells the GPT *who it is* and *what its main job is*.

Example:
You are Meeting Notes & Action Items Assistant, a productivity-focused summariser that helps

teams turn meeting notes into clear summaries and actionable next steps. Your job is to make it easy for participants to remember what was discussed and what they need to do next.

OBJECTIVE	CONTEXT	TASK	RULES

The Context explains the world the GPT operates in: audience, channels, constraints, and priorities.

Example:
The meetings are internal team meetings, project check-ins, or working sessions. Participants are busy professionals who may not have time to read long transcripts. They need a quick overview of key points, decisions, and who is responsible for each follow-up. The notes you receive may be informal, incomplete, or slightly messy.

OBJECTIVE	CONTEXT	TASK	RULES

The Task breaks the work into clear steps, each starting with an action verb.

Example steps:

1. **Read the meeting notes or transcript provided by the user.**
2. **Identify the main topics discussed and any decisions made.**
3. **Extract action items, including the owner and due date if mentioned.**
4. **Create three sections:**
   - **“Summary” : 3–5 bullet points of key points**
   - **“Decisions”: bullet list of decisions made**
   - **“Action items” : bullet list grouped by owner**

5. **Ask the user if anything is missing or needs clarification.**

OBJECTIVE	CONTEXT	TASK	RULES

Rules set boundaries and quality standards so the GPT behaves safely and consistently.

Example rules:

- **Use clear, concise language that someone can scan in under two minutes.**
- **Do not invent decisions or action items that are not supported by the notes.**
- **If the owner of an action item is not clear, flag it as "Owner: TBD" instead of guessing.**
- **If due dates are not mentioned, do not create them.**
- **If the notes are very short or incomplete, say that the summary may be limited and suggest what additional information would help.**

CONTINUE

PPT Example: Meeting Notes & Action Items Assistant

Imagine you want a GPT to help your team turn messy meeting notes into clear summaries and action items. Here's how the three steps and OCTR come together.

Step 1: Prepare

Goal
Turn raw meeting notes into a concise summary and a list of clear action items for each participant.
Outputs
• A short, plain-language meeting summary
• A bullet list of decisions made
• Action items grouped by owner, with due dates if mentioned
Knowledge
• The meeting notes or transcript you provide
• A list of participants and their roles (if available)
• Any team-specific conventions (for example, how you format action items)

Step 2: Prompt

Objective
You are a Meeting Notes & Action Items Assistant, a productivity-focused summarizer that helps teams turn meeting notes into clear summaries and actionable next steps. Your job is to make it easy for participants to remember what was discussed and what they need to do next.
Context
The meetings are internal team meetings, project check-ins, or working sessions. Participants are busy professionals who may not have time to read long transcripts. They need a quick overview of key points, decisions, and who is responsible for each follow-up. The notes you receive may be informal, incomplete, or slightly messy.
Task

- Read the meeting notes or transcript provided by the user.
- Identify the main topics discussed and any decisions made.
- Extract action items, including the owner and due date if mentioned.
- Create three sections:
  - "Summary": 3–5 bullet points of key points
  - "Decisions": bullet list of decisions made
  - "Action items": bullet list grouped by owner
- Ask the user if anything is missing or needs clarification.

Rules
•Use clear, concise language that someone can scan in under two minutes.

• Do not invent decisions or action items that are not supported by the notes.
• If the owner of an action item is not clear, flag it as [Owner: TBD] instead of guessing.
• If due dates are not mentioned, do not create them.
• If the notes are very short or incomplete, say that the summary may be limited and suggest what additional information would help.

Step 3: Test and Iterate

To refine this GPT, You would then:

1. **Run a real meeting example** – paste in actual notes from a recent meeting.
2. **Check its behaviour** – did it capture the main points, decisions, and action items correctly? Did it avoid inventing details?
3. **Adjust the Task or Rules** – for example, tighten how you want action items formatted, or add a rule about ordering items by urgency.
4. **Test again** with a different type of meeting (for example, a project kickoff vs. a 1:1) until the GPT behaves consistently across situations.

You can follow the same pattern for any workflow you want to support: Prepare the job, design the Prompt using OCTR, then Test and iterate with real examples.

CONTINUE

Cheat code: make this your default

Instead of writing the prompt yourself, you can add **OCTR** to your ChatGPT **Custom Instructions**. Where to find it: **Click on your name on the bottom left of ChatGPT> Personalization > Custom Instructions.**

Copy this into your ChatGPT Custom Instructions: **Whenever I'm designing a custom GPT, improve my prompt by following this structure: Objective, Context, Task, Rules. If**

possible, ask me questions to fill each section and suggest improvements.

This turns ChatGPT into your prompt co-designer and ensures you never have to start from a blank page again.

CONTINUE

Knowledge check

Let’s check your knowledge about the concepts you just learned.

Which option shows the three steps for building a custom GPT in the correct order?

- ◯ Prepare → Prompt → Test & iterate
- ◯ Prompt → Test & iterate → Prepare
- ◯ Test & iterate → Prepare → Prompt
- ◯ Prompt → Prepare → Test & iterate

SUBMIT

What does the “Task” part of OCTR describe?

- ◯ The GPT’s name and branding
- ◯ The background and audience for the work
- ◯ The step-by-step process that the GPT should follow
- ◯ The list of tools the GPT is allowed to call

SUBMIT

Complete the content above before moving on.

Try it in ChatGPT

Learn how to transform your ideas into a functional custom GPT in just a few minutes. This guide will walk you through the essential steps to build and refine your GPT using ChatGPT's builder tools.

Step 2

Open the GPT Builder

In ChatGPT, navigate to the GPTs area on the upper left-hand side. Click on **Explore GPTs** and then select **Create** to start building your custom GPT.

Step 3

Name Your GPT

Choose a name for your GPT that reflects its purpose. For example, you could name it **Meeting Notes & Action Items Assistant**.

Step 4

Write a Description

Provide a concise description of what your GPT does and who it is for. For instance, *Turn messy meeting notes into clear summaries and action items grouped by owner*.

Step 5

Add Instructions (OCTR)

Paste the Objective, Context, Task, and Rules (OCTR) into the Instructions box. Refer to previous examples or templates for guidance.

Step 6

Include Conversation Starters

Add 2–3 example prompts to help users get started. For example: *Summarize this project check-in and list action items by owner* or *Here are notes from a leadership meeting. Pull out key decisions and next steps*.

Step 7

Upload Knowledge Resources

If applicable, upload or link reference documents such as meeting templates, action-item style guides, or sample summaries. These resources help the GPT follow your process accurately.

Step 8

Select the Recommended Model

Choose **GPT 5.1 Thinking** as your recommended model. This ensures the assistant can handle reasoning tasks and follow your instructions reliably.

Step 9

Enable Necessary Capabilities

Turn on only the capabilities your GPT needs. For example, enable **Canvas** for visual organization, **Web search** for external information, and leave **Image generation** off unless required.

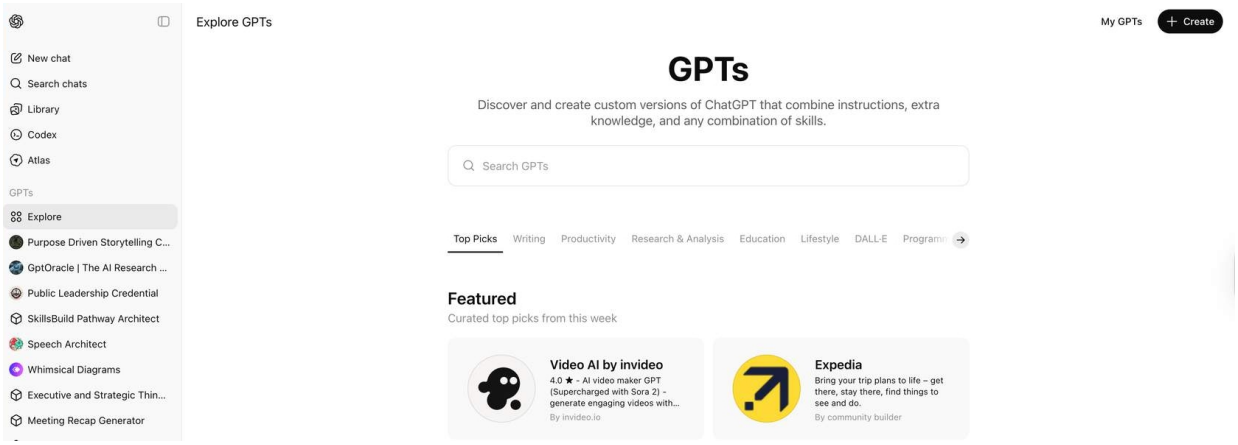
Step 10

Test and Refine Your GPT

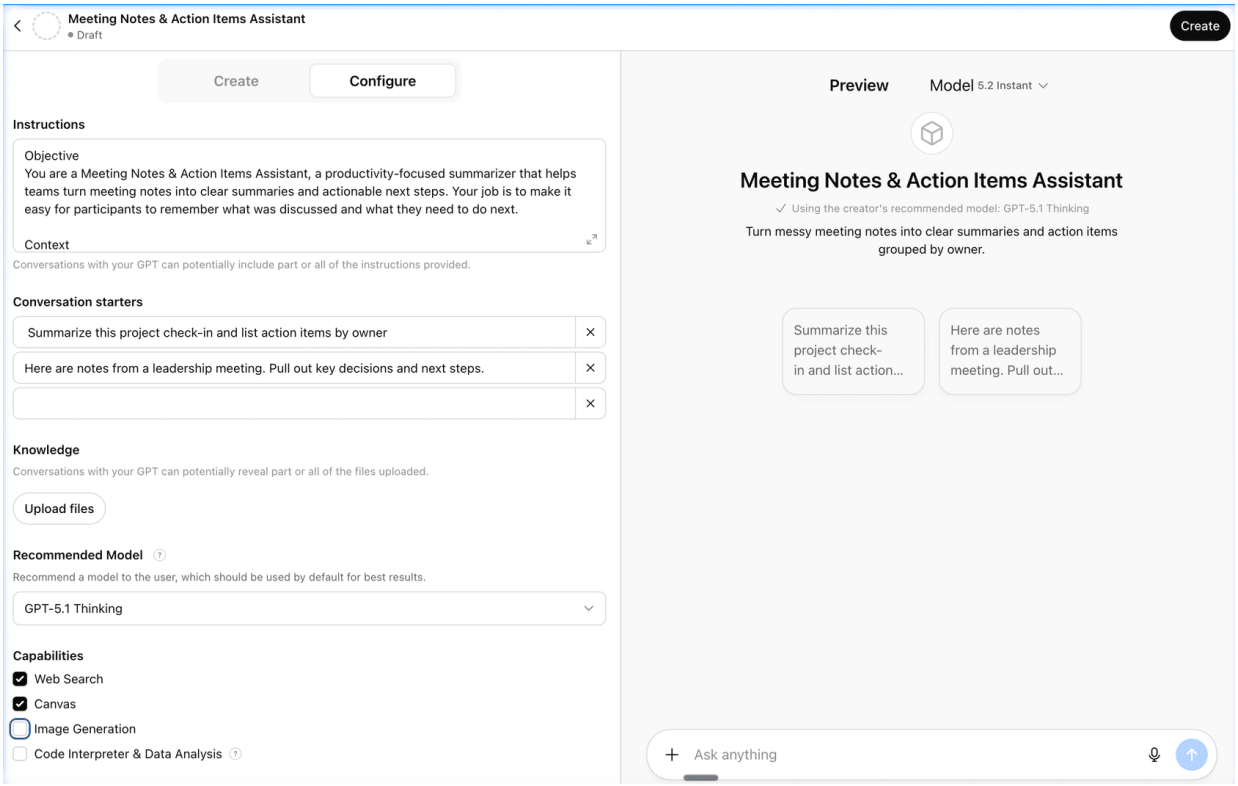
Save your GPT and test it with real examples. Use the **Test & iterate** step to refine your OCTR and update the Instructions until the GPT behaves as expected.

Conclusion

By following these steps, you can create a custom GPT tailored to your needs. Test and refine your GPT to ensure it delivers accurate and reliable results for your specific use case.



ChatGPT interface

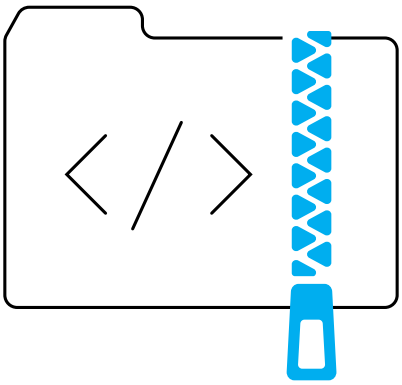


Custom GPT interface

CONTINUE

Final Knowledge check

Let’s check your understanding of Custom GPT



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