ChatGPT Business Setup Guide

Complete Implementation Guide for Small & Medium Businesses

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Time to Complete: 45-60 minutes
Difficulty: Intermediate

Purpose of This Setup

This guide will help you safely implement ChatGPT across your business to:

- Enable your team to use AI for daily tasks (drafting, research, analysis)
- Start small with key users, then expand once basics are working smoothly
- Keep everything compliant, secure, and easy for your team to use
- Establish best practices and workflows that scale

Part 1: Plan & Licensing

1.1 Choosing Your Plan

Start with a plan that matches your team size and security requirements.

Plan	Price (AUD)	Best For	Key Features
Plus	$30/user/month	1-2 users	GPT-4o, priority access, 80+ queries/3 hours
Team	$40/user/month	3-10 users	Everything in Plus + shared workspace, admin controls, no training on your data
Enterprise	Custom pricing	10+ users	Everything in Team + SSO, advanced security, dedicated support

Our Recommendation:

- **Solo/2 people:** Start with Plus
- **3-10 people:** Team plan for workspace management
- **10+ people:** Enterprise for compliance and security controls

1.2 Why the Business/Team Plan

The Team plan provides:

- **SOC 2 compliance** and stronger data controls
- **No training on your data** - your conversations stay private
- **Shared workspace** - collaborate and share custom GPTs
- **Admin controls** - manage who has access and monitor usage
- **Priority access** - faster responses during peak times

Important: Even with business plans, ChatGPT can still "hallucinate" (make up information). All outputs must be reviewed by humans before use in critical business decisions.

1.3 Usage Limits

- Each request to GPT-4o counts as one query, regardless of document size
- The system will notify you as you approach your limit
- Limits reset daily

- For heavy usage, consider Enterprise plan or use strategically (focus on high-value tasks)

Part 2: Create & Upgrade Your Workspace

Step-by-Step Setup

1. **Sign in to ChatGPT** with your business email address
2. **Go to Settings** → Billing / Plan
3. **Click Upgrade** and choose Team or Enterprise
4. **Set number of seats** (start with 3-5 users for testing)
5. **Enter billing details:**
   - Business name
   - ABN / business registration number
   - Card holder name and payment details
6. **Confirm subscription**

Once complete, you'll land in the workspace admin area where you can manage users and settings.

Part 3: Add and Manage Users

3.1 Initial Users

Start with a pilot group:

- Business owner / director
- 1-2 key team members who will champion AI adoption
- Optional: 1 technical/IT person if available

3.2 Inviting Users

1. In workspace admin panel, go to **Members / Users**

2. Click **Invite by email**

3. Add user emails (use business domain emails for better security)

4. Send invitations

5. Users receive email with join link:
   - They click the link
   - Sign in or create ChatGPT account with their work email
   - They're added to your workspace

3.3 Approvals & Access Control

Configure workspace settings:

- Allow anyone with your business domain email to request access
- Admin must approve new join requests
- Assign at least one backup admin to help manage invites

User Roles:

- **Owner:** Full control (billing, settings, users)
- **Admin:** Manage users and settings (no billing access)
- **Member:** Standard access to workspace features

Part 4: Security, Privacy & MFA

4.1 Data Protection Basics

ChatGPT Team/Enterprise handles data similarly to Microsoft 365 or Google Workspace:

- **Encryption:** Data encrypted in transit (TLS) and at rest
- **No training:** Your conversations are NOT used to train ChatGPT models

- **Privacy:** PII is redacted before any analysis
- **Retention:** You control chat history settings

Your Responsibilities:

- Review all AI outputs before using them
- Don't share sensitive customer data unnecessarily
- Use redaction for confidential information
- Follow your industry's compliance requirements

4.2 Multi-Factor Authentication (MFA)

Enable MFA for all users:

1. Go to **Settings → Security**
2. Click **Enable Two-Factor Authentication**
3. Download an authenticator app:
   - Google Authenticator (iOS/Android)
   - Microsoft Authenticator (iOS/Android)
   - Authy (iOS/Android/Desktop)
4. Scan QR code with authenticator app
5. Enter 6-digit code to confirm
6. **Save backup codes** in secure location (password manager or encrypted file)

Why MFA Matters: Without 2FA, anyone with a stolen password can access your entire ChatGPT history, including business strategies, customer information, and confidential plans.

4.3 Security Best Practices

DO:

- Use strong, unique passwords
- Enable MFA for all users
- Review chat history regularly

- Delete sensitive conversations after use

- Train team on what NOT to share

DON'T:

- Share passwords between team members

- Put credit card numbers or payment details in ChatGPT

- Share API keys or system passwords

- Upload confidential client contracts without redaction

- Use personal accounts for business work

Part 5: Connectors & Integrations

These are powerful but optional. Set up after core rollout is stable.

5.1 Microsoft 365 Integration

Outlook Email Connector:

- Purpose: Search your emails directly from ChatGPT

- Example: "Search my emails for recent correspondence about [project name]"

- Setup: Requires admin approval in Microsoft 365

- **Note:** If approval fails, revisit later with IT provider

SharePoint / OneDrive:

- Purpose: Access company documents and templates

- Use case: "Find our standard contract template and customize it for [client]"

- Setup: Connect SharePoint sites (not individual OneDrive accounts)

- **Best practice:** Create dedicated SharePoint folder for AI-accessible templates

5.2 Google Workspace Integration

Gmail Connector:

- Similar to Outlook integration

- Search and summarize email threads

- Draft responses based on email context

Google Drive:

- Access shared company documents

- Search across Drive for specific information

- Generate documents based on Drive templates

5.3 CRM / Practice Management Software

Common CRMs with AI Integration:

- HubSpot

- Salesforce

- Pipedrive

- Zoho CRM

Setup Approach:

1. Check if your CRM has an API

2. If yes, use custom GPT or Zapier to connect

3. If no, export data to SharePoint/Drive for ChatGPT access

Part 6: Personalization & Brand Alignment

6.1 Custom Instructions

Set up Custom Instructions for each user to maintain consistent tone and quality.

Navigate to: Settings → Personalization → Custom Instructions

Template for Custom Instructions:

```
WHAT WOULD YOU LIKE CHATGPT TO KNOW ABOUT YOU:
- Role: [Your job title] at [Company name]
- Industry: [Your industry]
- Location: Australia
- Company size: [Number of employees]
- Target audience: [Who you serve]

COMPANY VALUES:
- [Value 1, e.g., "Customer-first approach"]
- [Value 2, e.g., "Clear, jargon-free communication"]
- [Value 3, e.g., "Innovation with integrity"]

HOW WOULD YOU LIKE CHATGPT TO RESPOND:
- Tone: Professional, clear, and actionable
- Style: Australian English spelling and terminology
- Format: Use headings, bullet points, and tables for clarity
- Length: Concise but complete - no fluff
- Avoid: Jargon, overly formal language, American spelling
```

6.2 Brand Inputs

Gather these materials for AI training:

- Company letterhead and email signatures

- Standard email templates

- Example client communications

- Brand guidelines (tone, voice, style)

- Common document types (proposals, contracts, reports)

How to Use:

- Upload as reference documents when creating custom GPTs

- Paste examples in prompts to show desired style

- Build a "brand voice" library in your workspace

Part 7: High-Value Use Cases

7.1 Start with Low-Risk, High-Impact Tasks

Content Creation:

- Draft blog posts and social media content
- Create email newsletters
- Write product descriptions
- Generate marketing copy

Customer Communication:

- Draft customer emails and responses
- Create FAQ documents
- Write help center articles
- Personalize outreach messages

Internal Operations:

- Summarize meeting notes
- Create project timelines
- Draft standard operating procedures (SOPs)
- Generate training materials

Research & Analysis:

- Competitive analysis
- Market research summaries
- Industry trend reports
- Customer feedback analysis

7.2 Always Review AI Outputs

ChatGPT will make mistakes. All outputs must be:

- **Fact-checked** against authoritative sources

- **Edited** for accuracy and brand voice

- **Reviewed** by subject matter experts

- **Tested** before sending to customers or publishing

Red Flags to Watch For:

- Made-up statistics or data

- Non-existent sources or citations

- Overly confident statements about uncertain topics

- Generic advice that doesn't fit your specific situation

Part 8: Custom GPTs

Once your team is comfortable with basic ChatGPT, build custom GPTs for specific workflows.

8.1 What Are Custom GPTs?

Custom GPTs are specialized versions of ChatGPT trained on:

- Your specific instructions

- Your company documents

- Your brand voice and style

- Your common workflows

Benefits:

- Consistent outputs across team members

- Faster results (no need to re-explain context every time)

- Shareable within your workspace

- Easier onboarding for new team members

8.2 Example Custom GPTs for Business

1. Email Drafter GPT

- Input: Email context and key points
- Output: Professional email in your brand voice
- Includes: Greeting, body, call-to-action, sign-off

2. Content Marketing GPT

- Input: Topic and target audience
- Output: Blog post outline, draft, and social snippets
- Includes: SEO optimization and keyword integration

3. Meeting Assistant GPT

- Input: Meeting notes (bullet points)
- Output: Structured summary with action items
- Includes: Attendees, decisions, next steps, deadlines

4. Customer Support GPT

- Input: Customer question or complaint
- Output: Empathetic, solution-focused response
- Includes: Acknowledgment, solution, follow-up

8.3 How to Create a Custom GPT

1. Click your profile → **Explore GPTs** → **Create**
2. Use the GPT Builder to:
   - Name your GPT
   - Describe its purpose
   - Upload reference documents
   - Set instructions and tone
3. Test with sample inputs
4. Share with your workspace team

Part 9: Training Your Team

9.1 Initial Training Session (30-45 minutes)

Cover these topics:

- Logging into the workspace
- Choosing the right model (GPT-4o for serious work)
- Attaching files (PDFs, documents, images)
- Writing effective prompts (use RIPE framework from Getting Started guide)
- Reviewing and refining outputs
- Security and privacy guidelines

9.2 Ongoing Support

Weekly Check-ins (First Month):

- Review what's working and what's not
- Share successful prompts and use cases
- Address concerns and questions
- Identify new opportunities for AI use

Monthly Reviews (After First Month):

- Measure time saved and productivity gains
- Expand to new use cases
- Train new team members
- Refine custom GPTs and workflows

9.3 Building a Prompt Library

Create a shared document (Google Doc, Notion, or SharePoint) with:

Format:

```
USE CASE: [What this prompt does]
PROMPT TEMPLATE: [The actual prompt with [brackets] for customization]
EXAMPLE OUTPUT: [Sample of what you get]
NOTES: [When to use, tips for best results]
```

Categories:

- Customer emails

- Marketing content

- Internal documents

- Research and analysis

- Administrative tasks

Part 10: Rollout Plan & Next Steps

10.1 Week 1: Foundation

- ☐ Upgrade to Team/Enterprise plan

- ☐ Add initial 3-5 users

- ☐ Enable MFA for all users

- ☐ Set up custom instructions

- ☐ Conduct initial training session

10.2 Week 2-4: Pilot Phase

- ☐ Each user completes 5-10 tasks with ChatGPT

- ☐ Document successful use cases

- ☐ Build initial prompt library (10-15 prompts)

- ☐ Identify integration needs (email, documents, CRM)

- ☐ Measure time saved and quality improvements

10.3 Month 2: Expansion

- ☐ Add 5-10 more users
- ☐ Build 2-3 custom GPTs for common workflows
- ☐ Enable key integrations (email, SharePoint, etc.)
- ☐ Conduct team training workshop
- ☐ Establish AI usage guidelines and policies

10.4 Month 3+: Optimization

- ☐ Roll out to entire team
- ☐ Create advanced custom GPTs
- ☐ Integrate with core business systems
- ☐ Measure ROI (time saved, costs reduced, quality improved)
- ☐ Identify next-level automation opportunities

Part 11: ChatGPT Interface Quick Reference

11.1 Home Screen & Starting a New Chat

1. Go to chatgpt.com
2. Sign in with your work email
3. Confirm you're in your company workspace (check workspace name top-left)
4. Click **New Chat** to start fresh conversation

11.2 Choosing the Right Model

At the top of chat window, click model dropdown:

- **GPT-4o:** Use for important business tasks (drafting, analysis, research)
- **GPT-4o mini:** Use for quick, simple tasks (reformatting, simple questions)
- **GPT-3.5:** Legacy model, not recommended for business use

Rule of Thumb: When in doubt, use GPT-4o.

11.3 Adding Files

1. Click " **+**" **icon** in message box

2. Choose **Upload from this device** (or connected services if enabled)

3. Select files:
   - PDFs (reports, contracts, proposals)
   - Images (screenshots, diagrams, photos)
   - Spreadsheets (CSV, Excel)
   - Text documents (Word, Google Docs)

4. Wait for upload to complete (file names appear above message box)

Tips:

- You can attach multiple files per query
- Scanned documents work better if OCR-processed first
- Max file size: 512MB per file

11.4 Writing Effective Prompts

Use the **RIPE framework** (see Getting Started with ChatGPT guide):

Example:

```
Role: You are a marketing manager at a B2B SaaS company.

Instructions: Write a 300-word email to existing customers announcing our
new feature release.

Parameters:
- Tone: Friendly but professional
- Structure: Greeting → announcement → 3 key benefits → call-to-action →
sign-off
- Avoid: Technical jargon, overly salesy language

Examples: Use the attached customer email from March 2024 as a style guide.
```

11.5 Reviewing and Saving Work

1. **Review carefully** - check facts, tone, and accuracy
2. **Refine with follow-ups:**
   - "Make this more concise"
   - "Add a section about pricing"
   - "Change tone to be more formal"
3. **Rename chat** for easy retrieval (e.g., "Q4 Marketing Plan - Draft")
4. **Copy output** to your document or email client
5. **Star/pin important chats** if available

Part 12: Troubleshooting & FAQs

Q: ChatGPT is giving generic/boring outputs

A: Add more specificity to your prompts. Use the RIPE framework and include examples of the style you want.

Q: We're hitting usage limits too often

A: Upgrade to Enterprise for higher limits, or:

- Focus on high-value tasks only
- Use GPT-4o mini for simple tasks
- Batch similar tasks together
- Share workspace seats strategically

Q: ChatGPT made up facts or cited non-existent sources

A: This is called "hallucination" and is a known limitation. Always verify:

- Statistics and data
- Legal or regulatory information

- Technical specifications

- Historical facts

- Source citations

Q: How do we ensure compliance with our industry regulations?

A:

- Use Team/Enterprise plan (no training on your data)

- Enable all security features (MFA, data controls)

- Redact sensitive information before uploading

- Review all outputs before use

- Document your AI usage policies

- Consult with legal/compliance team for industry-specific requirements

Q: Team members are resistant to using AI

A:

- Start with volunteers/early adopters

- Share quick wins and time-saving examples

- Provide hands-on training and support

- Address concerns openly (job security, accuracy, etc.)

- Show, don't tell - demonstrate real results

Part 13: Measuring Success

Key Metrics to Track

Time Savings:

- Hours saved per week per user

- Tasks completed faster with AI

- Reduction in manual/repetitive work

Quality Improvements:

- Fewer errors in documents

- More consistent brand voice

- Better customer satisfaction scores

Cost Savings:

- Reduced need for external contractors

- Lower customer support costs

- Decreased training time for new hires

Productivity Gains:

- More content produced

- Faster project completion

- Increased output per team member

Monthly Review Template

What's Working:

- [List successful use cases]

- [Time saved estimates]

- [Quality improvements noted]

What's Not Working:

- [Challenges encountered]

- [Areas needing improvement]

- [Training gaps identified]

Next Month's Focus:

- [New use cases to try]

- [Team members to onboard]

- [Integrations to enable]

Conclusion

Implementing ChatGPT across your business is a journey, not a destination. Start small, measure results, and expand gradually. The businesses that succeed with AI are those that:

1. **Start with clear use cases** (don't try to do everything at once)
2. **Train their team properly** (invest in education and support)
3. **Measure and iterate** (track results and refine workflows)
4. **Maintain security** (protect data and follow best practices)
5. **Stay human-centered** (AI augments people, doesn't replace them)

Welcome to your AI-powered future. The Tech Horizon Academy community is here to support you every step of the way.

Quick Reference Checklist

Setup Checklist

- ☐ Choose and purchase Team/Enterprise plan
- ☐ Add initial 3-5 users
- ☐ Enable MFA for all users
- ☐ Set up custom instructions
- ☐ Configure workspace settings
- ☐ Conduct initial training session

Security Checklist

- ☐ MFA enabled for all users
- ☐ Strong passwords enforced

- [ ] Data controls configured
- [ ] Team trained on what NOT to share
- [ ] Regular security reviews scheduled

Optimization Checklist

- [ ] Prompt library created and maintained
- [ ] 2-3 custom GPTs built
- [ ] Key integrations enabled
- [ ] Monthly usage reviews scheduled
- [ ] ROI tracking in place

Need Help? Join the Tech Horizon Academy community or email support@techhorizonlabs.com

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