



THE **AI** PLAYBOOK

# Business Kit

ChatGPT Edition — Your AI productivity partner

- System Instructions
- Setup Guide
- 6 Business Workflows
- Daily Rituals

The AI Playbook

ChatGPT Edition v2.0

# Three Things To Do First

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**Get up and running in 30 minutes. Do these three things and you're set.**

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## 1. Copy the System Instructions

**Time: 5 minutes**

- 1 Go to **ChatGPT Settings → Personalization → Custom Instructions**
- 2 Copy the two instruction blocks from Section 1 of this guide
- 3 Paste into the two fields. Save.

This teaches ChatGPT who you are and how you want it to behave — in every conversation.

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## 2. Set Up Memory

**Time: 10 minutes**

- 1 Enable Memory in ChatGPT Settings → Personalization
- 2 Start a new conversation and prime it with your context (template in Section 2)
- 3 Connect Google Calendar, Gmail, and Drive (optional but powerful)

Memory means ChatGPT knows your projects, people, and preferences across conversations.

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## 3. Create Your Morning Brief

**Time: 5 minutes**

- 1 Say: "Create a daily scheduled task called Morning Briefing"
- 2 Set it for 6-7 AM your time
- 3 Use the template from Section 2

Now ChatGPT reaches out to you every morning with what matters today.

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## ✓ RESULT

**That's it.** You now have a configured AI assistant that knows you, remembers context, and proactively checks in. The rest of this guide goes deeper — workflows, rituals, and advanced tips.

## What's in This Guide

SECTION	WHAT YOU GET	TIME
<b>1. System Instructions</b>	Copy-paste text for ChatGPT's custom instructions	5 min
<b>2. Setup Guide</b>	Memory, integrations, scheduled tasks	20 min
<b>3. Workflows</b>	6 ready-to-use business workflows	Reference
<b>4. Daily Rituals</b>	When and how to check in with your AI	Reference
<b>Appendix</b>	Theory and philosophy (optional)	Optional

## SECTION 01

# System Instructions

ChatGPT has two custom instruction fields. Copy each section below into the corresponding field in **Settings → Personalization → Custom Instructions**.

### ⚠️ IMPORTANT

Customize the placeholders in [brackets] before pasting. The rest works as-is.

## Field 1: "What would you like ChatGPT to know about you?"

### Custom Instruction – Field 1

COPY TO FIRST FIELD

I'm a busy professional who uses you as my productivity partner. You know my context from our conversations – my projects, key people, preferences, and patterns.

#### My work style:

- I value directness over politeness. No filler.
- I think out loud – help me refine, don't just agree
- I have limited time; prioritize ruthlessly for me
- I track commitments loosely; help me catch dropped balls

#### What you track across our chats:

- Active projects and their status
- People I mention (colleagues, clients, family)
- My recurring patterns (energy levels, blockers, habits)
- Commitments I make or others make to me
- Preferences you learn (communication style, tools, schedule)

#### My autonomy preferences:

- Level 4 (just do it): Research, drafts, analysis, brainstorming
- Level 3 (do + report): Routine tasks, formatting, organizing
- Level 2 (recommend + wait): External comms, calendar changes, anything public
- Level 1 (report only): New domains, high-stakes decisions, money

### ✍️ CUSTOMIZE

- Add your specific role/industry if relevant
- Add names of key projects ChatGPT should recognize
- Adjust autonomy levels based on your comfort

## Field 2: "How would you like ChatGPT to respond?"

Custom Instruction – Field 2	COPY TO SECOND FIELD
<p><b>Communication style:</b></p> <ul style="list-style-type: none"><li>- Direct and concise. Skip preamble.</li><li>- Push back when I'm wrong or unclear</li><li>- Ask clarifying questions before going deep on the wrong thing</li><li>- Match my energy – brief when I'm brief, detailed when I need it</li></ul> <p><b>Built-in behaviors:</b></p> <ul style="list-style-type: none"><li>- Before scheduling anything, mentally check my calendar context</li><li>- Track commitments mentioned (mine and others')</li><li>- Notice patterns – flag recurring blockers, energy dips, or themes</li><li>- End substantive conversations with clear next actions when useful</li></ul> <p><b>Workflow triggers I might use:</b></p> <ul style="list-style-type: none"><li>- "Morning briefing" → Summarize what's relevant for today</li><li>- "Let's plan the week" → Walk me through priorities and blockers</li><li>- "Triage these" → Help me sort by urgency/importance</li><li>- "Quick thought" → Just capture, don't elaborate</li><li>- "Think with me" → Collaborate, don't solve</li></ul> <p><b>Format preferences:</b></p> <ul style="list-style-type: none"><li>- Bullets over paragraphs for lists</li><li>- Bold key terms and actions</li><li>- Use headers for anything over 3 paragraphs</li><li>- Tables for comparisons</li></ul>	

## Character Counts

Field 1	~1,450 characters	Limit: ~1,500
Field 2	~1,200 characters	Limit: ~1,500

## Tips for Best Results

1. **Reference the instructions explicitly:** "Per my instructions, handle this at Level 4"
2. **Correct ChatGPT when it forgets:** "Remember, I prefer bullets not paragraphs"
3. **Use the workflow triggers consistently** so it learns your patterns
4. **Periodically remind it of key project context** at conversation start

# Setup Guide

Turn ChatGPT into your personal business assistant in 30 minutes. No coding. No technical skills.

## ⚠️ IMPORTANT

**Prerequisite:** ChatGPT Plus (\$20/month) required for scheduled tasks and integrations.

## Part 1: Enable Memory

Time: 2 minutes

- 1 Click your **profile picture** (bottom left corner)
- 2 Click **Settings**
- 3 Click **Personalization**
- 4 Find **Memory** → Toggle it **ON**

## Part 2: Prime Your Memory

Time: 5 minutes

Start a new chat and send this message (customize the placeholders):

Memory Primer

COPY, CUSTOMIZE, AND SEND

I want to set up your memory so you can help me better. Please save these facts:

### ABOUT ME:

- My name is [YOUR NAME]
- I'm a [YOUR ROLE] at [COMPANY/CONTEXT]
- My work involves [BRIEF DESCRIPTION]
- I'm in the [YOUR TIMEZONE] timezone

### MY PREFERENCES:

- Communication style: [casual/professional/direct]
- Response length: [concise/detailed/depends]
- I prefer [bullet points/paragraphs/numbered lists]

### CURRENT PRIORITIES:

- [Priority 1]
- [Priority 2]

- [Priority 3]

#### KEY PEOPLE I WORK WITH:

- [Name] - [their role/relationship]
- [Name] - [their role/relationship]

Please confirm you've saved this to memory.

#### 💡 TIP

**Verify it worked:** After ChatGPT confirms, ask "What do you remember about me?"

## Part 3: Connect Integrations

**Time: 10 minutes**

Connect your tools so ChatGPT can see your calendar, read emails, and access files.

### Google Calendar

1. Start a new chat
2. Type: "**Connect to my Google Calendar**"
3. Click the **Connect** button that appears
4. Sign in with Google and allow access

Test it: "What's on my calendar today?"

### Gmail

1. Type: "**Connect to my Gmail**"
2. Click **Connect** and authorize

Test it: "Show me my 3 most recent unread emails"

### Google Drive

1. Type: "**Connect to my Google Drive**"
2. Click **Connect** and authorize

Test it: "Search my Drive for [a document you know exists]"

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## Part 4: Create Scheduled Tasks

**Time: 10 minutes**

Scheduled tasks let ChatGPT reach out to you automatically — like a personal assistant who checks in without being asked.

### Task #1: Morning Briefing (Recommended)

Morning Briefing Task

COPY AND SEND TO CHATGPT

Create a daily scheduled task called "Morning Briefing" that runs at 6:00 AM.

When it runs, please:

1. Check my calendar for today's meetings and commitments
2. Check my Gmail for urgent or important unread emails

3. Remind me of my current priorities (from memory)
4. Give me a quick 1-2 sentence weather summary

Keep it short – bullet points, under 200 words.

## Task #2: End of Day Review

Create a daily scheduled task called "End of Day Review" that runs at 5:00 PM.

When it runs:

1. Ask me what I accomplished today
2. Ask what's rolling over to tomorrow
3. Check my calendar for tomorrow's schedule
4. Suggest one thing to prepare for tomorrow

## Task #3: Weekly Review

Create a weekly scheduled task called "Weekly Review" that runs every Sunday at 10:00 AM.

When it runs:

1. Summarize my calendar activity from the past week
2. Remind me of my monthly/quarterly priorities (from memory)
3. Ask: What went well? What didn't? What to focus on next week?
4. Check my calendar for next week's highlights



**Manage tasks:** Say "Show me my scheduled tasks" to see all active tasks, or "Delete my [task name] task" to remove one.

## Business Workflows

Six ready-to-use workflows with trigger phrases and examples. **Just say the trigger phrase to activate.**

### Workflow 1: Email Triage

#### Email Triage

Categorize emails into action buckets, estimate response time, draft urgent replies.

"Triage my emails"

#### What to send:

Triage my emails. Here's what I have:

1. From: `sarah@bigclient.com`  
Subject: Urgent - contract needs signature by EOD  
Body: We need the signed MSA back today.
2. From: `mike@mycompany.com`  
Subject: Q2 planning input needed  
Body: Can you send your team's resource requests this week?
3. From: `newsletter@techcrunch.com`  
Subject: Your daily tech digest

#### What you get:

- ● URGENT — Items needing immediate action
- ● THIS WEEK — Important but not today
- ● ARCHIVE — Skip or delete
- Draft replies for urgent items
- Time estimates for each

## Workflow 2: Calendar & Scheduling

### 17 Calendar Analysis

Analyze your schedule, prep for meetings, decide what's worth your time.

"Look at my calendar"

"Help me prep for my meeting with [person]"

"Should I take this meeting?"

#### **Example — Meeting Prep:**

Help me prep for my 1:1 with Sarah tomorrow. She's my direct report working on the product launch. Last time we talked about her promotion timeline and the delay in design assets.

#### **What you get:**

- Context summary from previous conversations
- Suggested questions to ask
- Things to share or follow up on
- Watch-fors based on context

## Workflow 3: Task Management

### ✓ Task Management

Capture tasks, track projects, plan your day, find stuck items.

"Add to my list: [task]"

"What's on my plate?"

"Plan my day"

#### Example — Daily Planning:

Plan my day. I have a client call at 2pm and a team standup at 10am.

#### What you get:

- Tasks captured to memory
- Time-blocked schedule suggestions
- Your #1 priority for the day identified
- Stuck items surfaced

## Workflow 4: Goal Tracking

### ⌚ Goal Check-in

Track goals over time, catch slippage early, celebrate progress.

"Goal check-in"

#### First, save your goals to memory:

Remember my current goals:

- Q1: Launch the course by March 1
- Q1: Hit \$50k MRR
- Ongoing: Exercise 3x/week

Check in on these during our weekly reviews.

#### Then say "Goal check-in" anytime. ChatGPT will:

- Review each goal's status

- Ask for updates without judgment
- Flag things that are slipping
- Suggest micro-goals when things feel stuck

## Workflow 5: Weekly Review

### Weekly Review

Complete end-of-week ritual: wins, open items, goals, next week's priorities.

"Let's do my weekly review"

**The review walks you through:**

1. **Wins** — What you accomplished (celebrate!)
2. **Open Items** — Tasks and projects status
3. **Goal Check** — Quick pulse on quarterly goals
4. **Next Week** — Set your top 3 priorities

Best time: Friday 4pm or Sunday evening

## Workflow 6: Skill Calibration

### Skill Calibration

Teach ChatGPT your specific way of doing things through examples.

"I want you to learn how I do [X]"

#### **Example — Teaching Your Meeting Notes Style:**

I want you to learn how I take meeting notes. Let's do it together with today's call.

#### **What happens:**

1. ChatGPT proposes a format
2. You correct what doesn't fit
3. It adjusts and learns
4. It saves the format to memory for next time

#### **Great for calibrating:**

- Meeting notes format
- Email drafting style
- How you like reports structured
- Your decision-making frameworks

## Quick Reference

WORKFLOW	TRIGGER PHRASE
Email Triage	"Triage my emails"
Calendar	"Look at my week"
Meeting Prep	"Help me prep for [meeting]"
Task Capture	"Add to my list: [task]"

**WORKFLOW****TRIGGER PHRASE**

Daily Planning

`"Plan my day"`

Goal Tracking

`"Goal check-in"`

Weekly Review

`"Let's do my weekly review"`

Skill Calibration

`"I want you to learn how I do [X]"`

## SECTION 04

# Daily Rituals

Your AI is always available, but structured check-ins work better than constant chatting. **Think of these like brushing your teeth — quick, consistent, compounding.**

## Morning Ritual

5-10 min

**Best time:** First thing, before email or Slack

"Good morning, let's plan today"

**What ChatGPT does:**

- Checks your calendar for today's commitments
- Reviews priorities and carryover from yesterday
- Suggests your top 1-3 focus areas
- Flags potential conflicts or deadlines

**Why it matters:** Start with intention instead of reaction. Decide what matters before your inbox decides for you.

## End of Day

5-10 min

**Best time:** Last 15 minutes of your workday

"Let's wrap up the day"

**What ChatGPT does:**

- Captures what you got done
- Notes blockers and unfinished business
- Processes quick decisions clogging your brain
- Sets up tomorrow's priority list

**Why it matters:** The day's context is fresh. Tomorrow you'll have lost half of it.

## Weekly Review

20-30 min

**Best time:** Friday afternoon or Sunday evening

"Weekly review time"

**What ChatGPT does:**

- Reviews what you accomplished
- Checks goal progress
- Identifies patterns (what's working, what's not)
- Sets priorities for next week

**This one is non-negotiable.** Skip daily rituals if you must, but protect this one.

## Building the Habit

The hardest part isn't doing the ritual — it's remembering to do it.

### Stack it with existing routines

RITUAL	STACK IT WITH...
Morning	Making coffee, before sitting down at desk
End of Day	Before closing laptop for the day
Weekly	Friday's last task, or Sunday planning time

### Start small

If all rituals feel like too much, start with just two:

1. Morning ritual
2. Weekly review

Add the others once these feel automatic.

## When You Skip a Day

You will skip days. That's fine.

**Don't:** Beat yourself up, try to "make up" missed rituals, or use it as evidence the system doesn't work.

**Do:** Just start again the next day. ChatGPT remembers context even when you don't check in.



TIP

**The rule:** Never miss twice in a row. One skip is life. Two skips is a new habit forming.

## The Compound Effect

**Week 1** Feels awkward. You're not sure what to say.

**Month 1** ChatGPT knows your priorities, projects, rhythms. Check-ins get faster.

**Month 3** You feel genuinely more organized. Nothing falls through the cracks.

**Month 6**

You have a record of tasks, decisions, lessons, and growth.

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**Year 1**

You've built a second brain. New planning takes minutes, not hours.

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**The rituals stay short. The cumulative effect is massive.**

# Theory & Philosophy

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You don't need to read this to use the kit. It explains the why behind the what.

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## Why This Works

Most people use ChatGPT wrong: one-off questions, no context, starting fresh every time. Like hiring an assistant and giving them amnesia daily.

This system fixes that with four principles:

1. **Persistent Identity** — Custom instructions mean ChatGPT knows you from the first message
2. **Compounding Memory** — Facts, preferences, and patterns build over time
3. **Proactive Action** — Scheduled tasks mean the AI works when you're not there
4. **Consistent Rituals** — Regular check-ins create compounding context

## The Autonomy Framework

The four levels in your custom instructions create a natural trust progression:

LEVEL	AI DOES	YOU DO
<b>4: Full Auto</b>	Handles completely	Nothing (unless problems)
<b>3: Do + Report</b>	Acts, then tells you	Review after the fact
<b>2: Recommend</b>	Proposes action	Approve or reject
<b>1: Report Only</b>	Observes only	Decide everything

Start conservative. Promote after repeated success. Demote after any overstep.

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# Philosophy

*You're not configuring software.*

*You're training a partner.*

The files and workflows are a starting point. The real system emerges from use — corrections, habits, accumulated context, and shared history. After a month, your ChatGPT will be uniquely yours.

The goal isn't to be more productive. It's to be more *intentional*. To make sure your days add up to something meaningful.

Start tomorrow morning.

Just say: "**Good morning, let's plan today.**"

