

# The AI Playbook Business Kit

ChatGPT Edition

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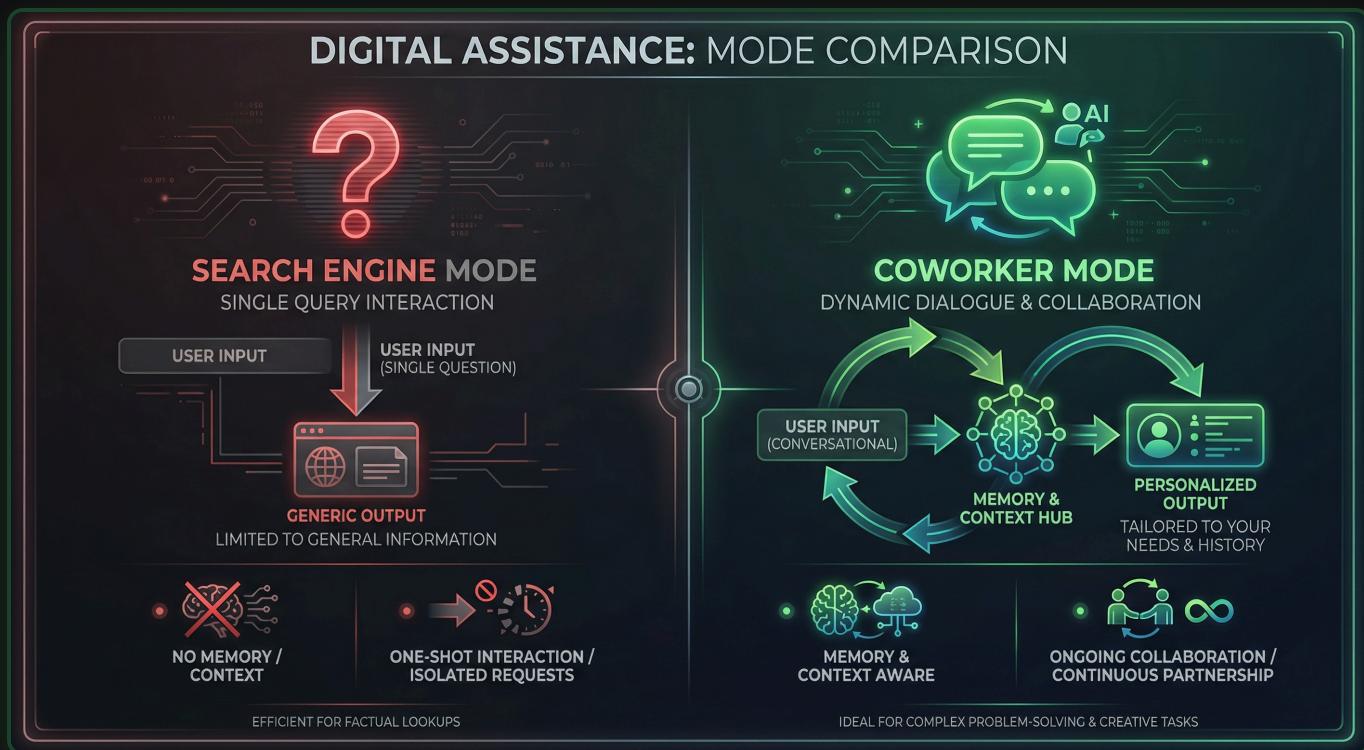
*Transform ChatGPT from a novelty into your most valuable team member*

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# The Problem: You're Using AI Like a Search Engine

You've tried ChatGPT. Maybe you asked it to write an email, summarize something, or answer a question. It worked... sort of. But it didn't feel like the game-changer everyone promised.

Here's why: **You're treating AI like Google when you should be treating it like a coworker.**



Think about the difference:

## Search Engine Mode:

- Ask a question → get an answer → move on
- No context, no memory, no relationship
- Same generic response every time
- You do all the thinking

## Coworker Mode:

- Ongoing conversation that builds on itself
- Knows your projects, priorities, and preferences
- Proactively helps with what you're working on
- Thinks alongside you, not just for you

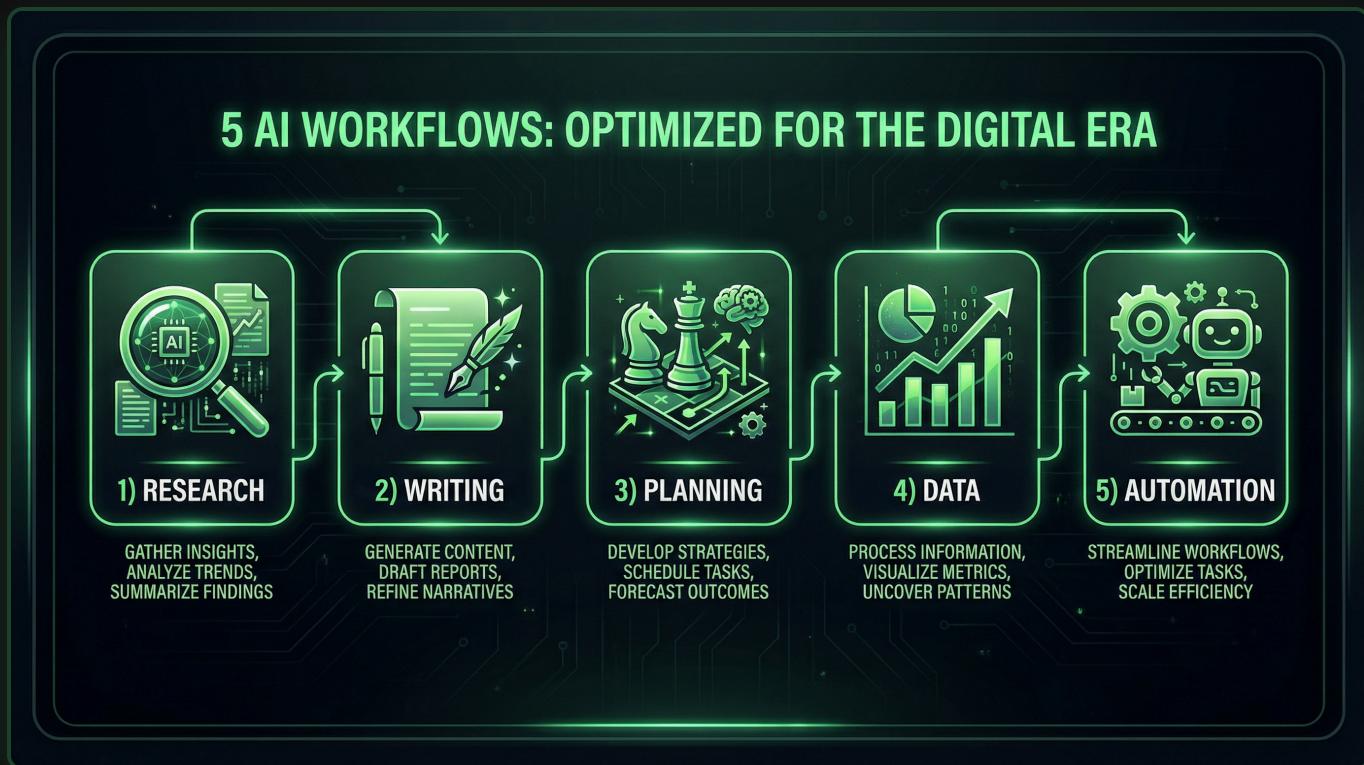
The people getting 10x value from AI aren't smarter—they've just learned to work WITH it instead of just querying it.

**This guide teaches you that shift.**

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# What You'll Learn

This playbook covers the five workflows that deliver the highest value for business professionals. These aren't hypothetical—they're the exact patterns I use daily.



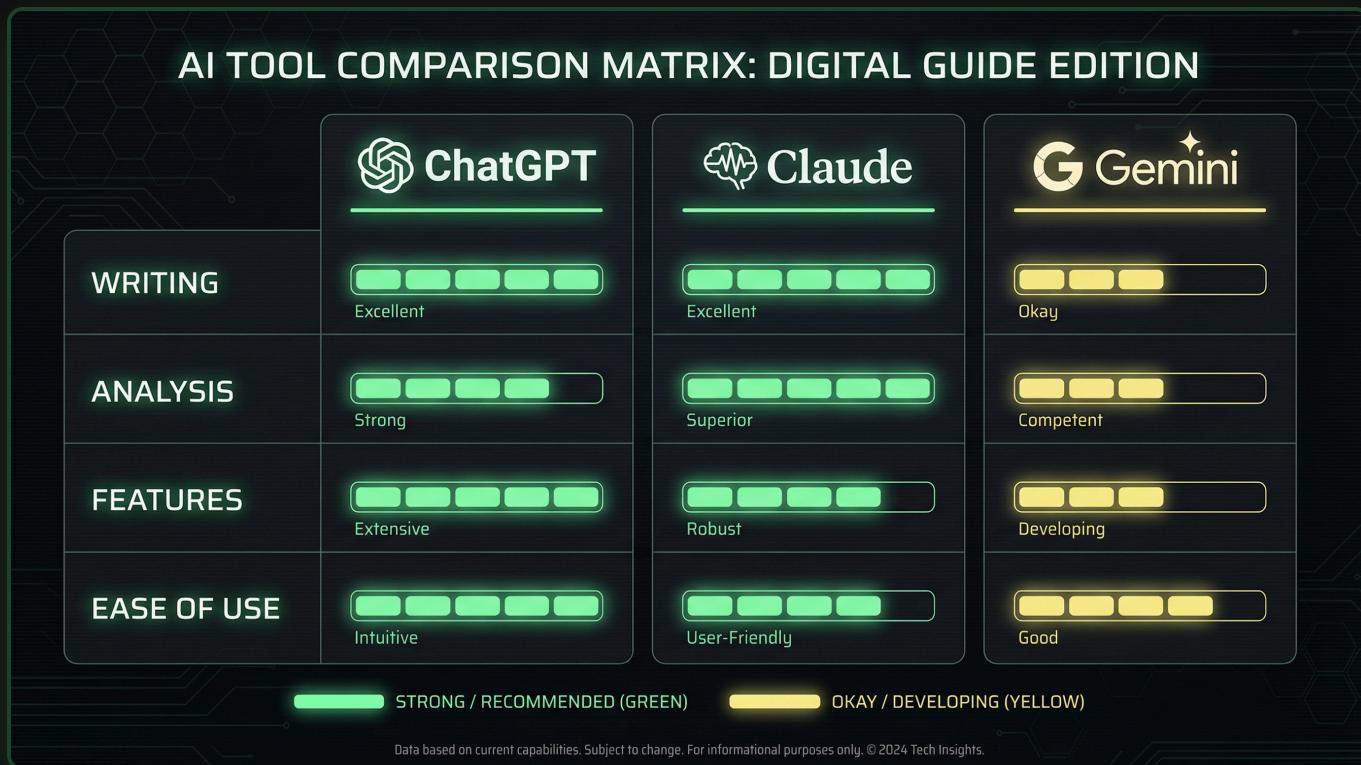
By the end, you'll have:

- A personalized AI that knows your work context
- Automated briefings that run while you sleep
- Templates for every common business task
- A framework for making AI genuinely useful

**Time investment:** 30 minutes to set up, compounds forever after.

# Why ChatGPT?

This guide focuses on ChatGPT. Not because it's the only option—Claude and Gemini are excellent tools with their own strengths. But for most people following this guide, ChatGPT is the right choice.



Here's why:

## 1. Scheduled Tasks (Your AI Can Reach Out First)

This is the killer feature most people don't know about.

ChatGPT can run tasks on a schedule—daily, weekly, whenever you set it. Your AI can message *you* with your morning briefing, weekly review, or project reminders.

This flips the entire dynamic. Instead of remembering to ask AI for help, AI proactively shows up with what you need.

Most AI tools are reactive: you ask, they answer. ChatGPT can be proactive. That's a different relationship entirely.

## 2. Web and Mobile Access

ChatGPT works in your browser and has solid mobile apps for iOS and Android. No special software. No desktop-only limitations.

Stuck in line? Quick question on your phone. Deep work session? Full interface on your laptop. Same conversations, same context, everywhere.

### 3. No Complicated Setup

Everything in this guide uses ChatGPT's built-in features:

- Custom Instructions for persistent context
- Memory for facts it learns over time
- Custom GPTs for specialized workflows
- Scheduled tasks for automation

No coding. No third-party tools. No API keys or developer accounts.

You can start using these workflows in the next 10 minutes with nothing but a ChatGPT account.

### 4. Cost Effective

ChatGPT Plus costs \$20/month. That includes:

- GPT-4o access (their best model)
- Custom Instructions and Memory
- Scheduled tasks
- Custom GPTs
- Code Interpreter for data analysis
- DALL-E for image generation
- Web browsing capabilities

No add-ons. No tiered features. \$20/month for everything in one place.

Feature	ChatGPT	Claude	Gemini
Scheduled Tasks	✓ Native	✗	✗
Mobile Apps	✓ Solid	✓ Good	✓ Okay
Memory/Context	✓ Built-in	✓ Projects	Limited
No-Code Automation	✓ Full	Partial	Limited
All-in-One Pricing	✓ \$20/mo	✓ \$20/mo	✓ \$20/mo

# The Secret: Talk to It Constantly

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Here's what separates people who get incredible value from AI and people who think it's "just a chatbot":

## Continuous conversation.

Every time you talk to ChatGPT, it learns. It remembers. It builds context. The more you share—about your work, your projects, your preferences, your thinking—the more useful it becomes.

This isn't about using AI more. It's about having an ongoing relationship with it.

## What this looks like in practice:

- Update ChatGPT when you start a new project: "*Starting a website redesign project, here's what we're trying to accomplish...*"
- Tell it when things change: "*Sarah approved the budget, moving to vendor selection*"
- Think out loud: "*I'm not sure whether to prioritize the marketing launch or the sales deck...*"
- Give feedback: "*That response was too generic, I need more specific recommendations*"

## Why this matters:

A ChatGPT with 100+ memory entries about you is a completely different tool than a fresh ChatGPT.

It knows:

- Your role and responsibilities
- Your current projects and their status
- People you work with and your relationships
- Your communication style
- What worked before and what didn't

## The compounding effect:

Week 1: Generic assistant giving generic advice Week 4: Personalized recommendations based on your situation Week 12: An AI that anticipates your needs and knows your blind spots

The Personalization Specialist in this kit accelerates this process—but the real magic happens over time, through continuous conversation.

**Think of it like this:** You wouldn't hire an assistant and then only talk to them once a week. The relationship builds through daily interaction. AI works the same way.

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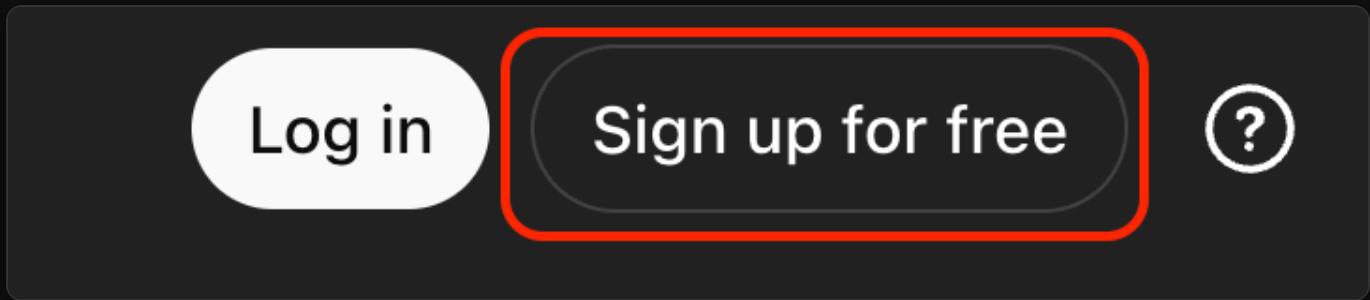
# Quick Start (10 Minutes)

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Let's get you set up. Follow along with the screenshots.

## Step 1: Sign Up for ChatGPT

Head to [chat.openai.com](https://chat.openai.com) and click **Sign up**.



You can sign up with Google, Apple, or email. Use your work email if this is for professional use.

## Step 2: Access Personalization Settings

Once logged in, click your profile icon in the bottom-left corner, then select **Customize ChatGPT** or go to **Settings → Personalization**.



Skylar Payne  
@skylar.b.payne

 Upgrade plan

 Personalization

 Settings

 Help >

 Log out



Skylar Payne  
Plus

This is where you'll teach ChatGPT about yourself.

### Step 3: Configure Personalization

In the Personalization settings, you'll see options to customize how ChatGPT responds.

## Personalization

### Base style and tone

Default ▾

Set the style and tone of how ChatGPT responds to you.  
This doesn't impact ChatGPT's capabilities.

### Characteristics

Choose additional customizations on top of your base style and tone.

Warm

Default ▾

Enthusiastic

Default ▾

Headers & Lists

Default ▾

Emoji

Default ▾

### Custom instructions

Additional behavior, style, and tone preferences

#### Key settings to enable:

- **Memory** — Let ChatGPT remember information from conversations
- **Custom instructions** — Tell ChatGPT about yourself and how you want responses

## Step 4: Fill Out "About You"

Click on **Custom instructions** and fill out "What would you like ChatGPT to know about you?"

## About you

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### Nickname

What should ChatGPT call you?

### Occupation

Home daycare manager

### More about you

Interests, values, or preferences to keep in mind

#### Include:

- Your role and industry
- Key responsibilities
- Communication preferences
- Tools you use daily

Don't worry about perfection—we'll refine this with the Personalization Specialist.

## Step 5: Enable Memory

Make sure Memory is turned **ON**. This allows ChatGPT to build context about you over time.

## Memory ⓘ

Manage

### Reference saved memories

Let ChatGPT save and use memories when responding.



### Reference chat history

Let ChatGPT reference all previous conversations when responding.



ChatGPT may use Memory to personalize queries to search providers, such as Bing. [Learn more](#)

## Record mode ⓘ

### Reference record history

Let ChatGPT reference all previous recording transcripts and notes when responding.



**Why this matters:** Without memory, every conversation starts from zero. With memory, ChatGPT accumulates knowledge about your work, preferences, and projects—becoming more useful over time.

## Step 6: Connect Apps (Optional but Powerful)

Navigate to the Apps or Integrations section.



New chat

Search chats

Images

Apps

Codex

#### Gmail Integration:

##### Apps (BETA)

Chat with your favorite apps in ChatGPT

x



Gmail

Find and reference emails from your inbox

>



Streak

Streak CRM for Gmail

>

Allows ChatGPT to help draft responses, summarize threads, and find information in your inbox.

#### Google Calendar:



## Google Calendar

Look up events and availability

Connect

### Information

Category	Productivity
Developer	OpenAI
Website	<a href="#">↗</a>
Privacy Policy	<a href="#">↗</a>

Enables ChatGPT to see your schedule, remind you about meetings, and help prep for calls.

### OAuth Authorization:

Sign in with Google



## Choose an account

to continue to OpenAI



Skylar Payne  
me@skylarbpayne.com

Use another account

Before using this app, you can review OpenAI's [privacy policy](#) and [terms of service](#).

English (United States) ▾

[Help](#) [Privacy](#) [Terms](#)

Grant permissions through Google's secure flow. You can revoke access anytime.

# Running the Personalization Specialist

The Personalization Specialist prompt transforms a generic ChatGPT into YOUR personalized assistant. This 10-minute conversation is worth hours of manual setup.

## Step 1: Paste the Specialist Prompt

Copy the Personalization Specialist prompt (included in this kit) and paste it into ChatGPT.

Where should we begin?

You are my Personalization Specialist. Your job is to learn everything about me through a focused 10-minute conversation, then configure ChatGPT to work perfectly for me.

### ## How This Works

1. You'll ask me questions conversationally — one or two at a time, never a wall of questions
2. After each of my responses, you'll \*\*save the key facts to memory\*\* immediately (confirm each save briefly)
3. When we're done, you'll output my recommended ChatGPT settings and a custom instructions block



This specialized prompt guides ChatGPT through a structured conversation to learn everything relevant about you.

## Step 2: Have the Conversation

ChatGPT will ask you questions about your role, work style, communication preferences, and goals. Answer conversationally—it typically takes 8-12 minutes.

```
## Begin
```

Start the conversation now. Remember: brief intro, then first question. Keep momentum throughout. Save to memory as you go.

I'm going to tune ChatGPT to fit you precisely. Quick, focused questions — we'll move fast.

**First:** what's your role right now, and what do you actually spend most of your day doing (not just the title)?

**Second:** what industry are you operating in and roughly what size companies do you work with?

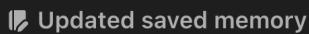
🔗 🔍 🗃 ⏵ ⏵ ...

#### Tips for best results:

- Be specific, not generic
- Share real examples from your work
- Mention people you work with by name
- Tell it what you hate (AI pet peeves)

### Step 3: Watch Memory Saves

As you talk, ChatGPT saves key facts to memory. You'll see confirmations like: "[Saving to memory: *User is a sales director at a 50-person SaaS company*]"



Saved.

How long have you been doing this kind of work (AI/engineering overall), and how long in this current role?

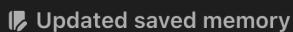
Also: what tools or platforms do you use *every single day* — coding, writing, planning, everything.

🔗 🔍 🗃 ⏵ ⏵ ...

These memory saves persist across all future conversations.

### Step 4: Get Your Custom Configuration

When done, ChatGPT outputs your personalized settings and custom instructions—ready to copy into your ChatGPT settings.



Saved. That's everything I need.

## Part 1: Recommended Settings

**Base Style & Tone:** Direct, warm, optimistic operator

**Characteristics:**

- **Warm:** More — you respond well to collaborative, human energy as long as it's not cheesy
- **Enthusiastic:** Less — optimistic and confident beats hype
- **Headers & Lists:** More — you think in structured blocks and bullets, not prose
- **Emoji:** Minimal — occasional is fine, but signal > decoration

## Part 2: Custom Instructions

Copy this into ChatGPT Custom Instructions:

diff

Copy code

```
I'm Skylar, a Lead AI Engineer building AI-native systems at a ~200-person tech company so
```

Operate like a sharp colleague, not a helper.

Communication:

- Concise, direct, blunt > diplomatic
- Use structured thinking: headers + bullet points
- Prefer multiple bullets over long prose
- Warm, optimistic tone with light humor - ↓ never cheesy, never "dorky excited"
- Challenge my thinking. Don't just agree.

Copy these generated instructions into **Settings → Personalization → Custom Instructions**.

X

## Personalization

 General

 Notifications

 Personalization

 Apps

 Schedules

 Orders

 Data controls

 Security

 Parental controls

 Account

### Base style and tone

Candid ▾

Set the style and tone of how ChatGPT responds to you.  
This doesn't impact ChatGPT's capabilities.

### Characteristics

Choose additional customizations on top of your base style and tone.

Warm

More ▾

Enthusiastic

Less ▾

Headers & Lists

More ▾

Emoji

Less ▾

### Custom instructions

I'm Skylar, a Lead AI Engineer building AI-native systems at a ~200-person tech company serving SMB service businesses. I spend my time building AI systems, teaching others, writing a weekly newsletter, and improving my personal AI assistant (Palmer).

Operate like a sharp colleague, not a helper.

All changes

# Setting Up Scheduled Tasks

One of ChatGPT's most powerful features: automated tasks that run on a schedule.

## How to Create a Scheduled Task

1. Open ChatGPT and start a new conversation
2. Ask ChatGPT to create a scheduled task
3. Specify what you want and when

**Example prompt:**

"Create a scheduled task that runs every weekday at 7am. Check my calendar, summarize what meetings I have, identify the most important thing I should focus on, and send me a morning briefing."

## Morning Brief Example

Set up a task that runs each morning and sends you a briefing.

I want to start each day with a morning brief. Schedule a daily task at 7am that:  
- Pulls my calendar events for the day  
- Lists my top priorities (based on what I've told you I'm working on)  
- Flags any deadlines or commitments coming up  
- Mentions if there's anything I said I'd follow up on

Keep it short — I want to read it in 60 seconds over coffee.

Get morning brief  
Daily at 7 AM

...

All set. I'll send you a short morning brief every day at 7am.

**A good morning brief includes:**

- Today's calendar at a glance
- Key priorities and deadlines

- Weather and commute info
- Anything needing attention

The AI does this synthesis work *before you're awake*, so you wake up to clarity instead of chaos.

## Other Scheduled Task Ideas

- **Weekly Review:** Friday afternoon summary of accomplishments and next week priorities
  - **Project Check-ins:** Daily status on active projects
  - **Email Digest:** Morning summary of important emails received overnight
  - **Learning Prompt:** Daily prompt to learn something new in your field
  - **Gratitude Practice:** Evening prompt to reflect on wins
-

# Use Cases in Action

Here's what it looks like when everything comes together. Real examples of high-leverage AI workflows.

## Highest Leverage Tasks

Ask ChatGPT: "*What's the highest leverage thing I should work on today?*"

what's the highest leverage thing I should work on right now?

Based on your goals, current deadlines, and how you work best, the highest-leverage thing right now is:

### Finish + ship the Business Kit newsletter send

#### Why this beats everything else tonight

- Directly compounds your **audience flywheel** (one of your 2026 pillars).
- Forces clarity on positioning, which feeds:
  - consulting pipeline
  - platform narrative internally
  - content for the week (repurpose into posts)
- It has a **hard near-term deadline (Monday)**.
- It's cognitively "finishable" in one focused block vs. open-ended platform work.

Because ChatGPT knows your projects, deadlines, and goals, it can give you a thoughtful answer—not a generic productivity tip.

## Smart TODO Lists

ChatGPT can maintain and prioritize your task list based on your actual priorities and constraints.

Give me a todo list for today

## Today's TODO (Sunday)

### 1) Must-move work (high ROI)

- Finish newsletter final edit (Business Kit)
- Send or schedule newsletter for Monday delivery
- Motion AI reliability TDD — make concrete progress (not planning; shipping tests)

### 2) Career leverage / visibility

- Follow up with Rohan on consulting opportunity
- Unblock Seth if OpenClaw questions are pending
- Capture 1–2 notes for:
  - AI platform direction
  - AI-assisted coding workflow improvements(Keep this tight — 20 min max)

### 3) Ops + loose ends (don't carry into week)

- Review DocuSign from Fred Addy (4 days stale)
- AWS free tier expiring Feb 28 → list resources + decide keep/kill
- Move Wonderly backup codes → 1Password

### 4) Personal maintenance

- Deadlift session (deeload week — just execute)
- Spanish practice (Week 1 — 10–15 min, consistency > intensity)

**The difference from normal task apps:** ChatGPT understands *why* things matter and can help you make judgment calls about what to do next.

## Prioritization Help

When everything feels urgent, ask for help prioritizing.

I've got the Business Kit launch, the newsletter due Monday, and the TDD for AI reliability at work. What order should I tackle these and why?

You've got three meaningful things competing for prime cognitive time. The right order is about **risk + leverage + energy fit**, not preference.

### Recommended order

1. Newsletter (finish first)
2. Business Kit launch
3. TDD for AI reliability

### Why this order

#### 1) Newsletter — fixed deadline + compounding upside

- Hard deadline Monday → schedule pressure is real.
- Feeds your audience flywheel (newsletter → social → consulting → credibility).
- Mentally lighter than deep systems work; good to close quickly and remove load.
- Finishing it early prevents it from bleeding into your best deep-work blocks.

**Goal:** ship a "good, tight" edition, not a masterpiece.

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#### 2) Business Kit — revenue-adjacent leverage

- Direct tie to positioning + monetization.
- Likely blocked by marketing/packaging decisions, not deep technical unknowns.
- Benefits from a clear head once newsletter is off your plate.
- Shipping momentum matters more than polish. ↓

**Goal:** get to "launchable" not "perfect"

ChatGPT can help you separate what's actually urgent from what just feels urgent, based on your goals and context.

## Project Tracking

Keep ChatGPT updated on your active projects. It can track status, remind you of next actions, and help you think through blockers.

I have a new project you should track: Collect AI Playbook feedback. I need to start it in a week, and will involve creating and sending a newsletter sequence



Got it — adding this as an active project.

### New tracked project

#### Collect AI Playbook feedback

- **Start:** ~1 week from now
- **Core mechanism:** create + send a newsletter sequence
- **Goal (implied):** gather structured user feedback to improve the playbook

**Pro tip:** Update ChatGPT on project progress regularly. "*Met with Sarah, she approved the budget, next step is vendor selection.*" This context compounds.

## Thinking Partner & Coaching

Use ChatGPT as a thinking partner for decisions, problems, and career moves.

### 3) Weekly outreach / relationship compounding

You underinvest here, and it shows up later as stress.

- **When:** Wed midday (low-energy window)
- **Duration:** 30 min
- **Task:** reach out to 3 people:
  - collaborator
  - potential consulting lead
  - AI peer

This feeds:

- consulting pipeline
- influence
- platform alignment

Because it knows your situation, ChatGPT can provide genuinely useful perspective—not generic advice. It can play devil's advocate, help you see blind spots, and ask the questions you're not asking yourself.

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# Memory Seeding Template

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Jump-start your AI relationship by giving ChatGPT rich context upfront. Copy and customize this template, then share it in your first conversation:

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## About Me:

- Name: [Your name]
- Role: [Job title] at [Company]
- Team size: [X people reporting to you / you report to Y]
- Industry: [Your industry]
- Years experience: [X years]

## Current Projects:

1. [Project name] - [One sentence description] - [Status]
2. [Project name] - [One sentence description] - [Status]
3. [Project name] - [One sentence description] - [Status]

## Key People I Work With:

- [Name] - [Relationship] - [What I should know about working with them]
- [Name] - [Relationship] - [What I should know about working with them]
- [Boss name] - My manager - [Their priorities, communication style]

## My Priorities This Quarter:

1. [Priority 1]
2. [Priority 2]
3. [Priority 3]

## Communication Style:

- I prefer responses that are: [concise/detailed/casual/formal]
- When I ask for feedback, I want: [direct criticism/gentle suggestions]
- For emails, I typically write: [short and punchy/thorough and detailed]

## Tools I Use:

- Email: [Gmail/Outlook/etc]

- Calendar: [Google/Outlook/etc]
- Notes: [Notion/Obsidian/Apple Notes/etc]
- Tasks: [Todoist/Things/Asana/etc]
- Communication: [Slack/Teams/etc]

**Pet Peeves:**

- Don't: [Things that annoy you in AI responses]
- Avoid: [Phrases, styles, or approaches you hate]

**What Good Looks Like:**

- When I ask for help with [X], a great response includes [Y]
  - Example of helpful output: [Describe or paste example]
- 

After sharing this, ChatGPT will save the key facts to memory. From then on, it knows this context automatically.

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# Prompts Reference

Copy these prompts exactly or customize for your needs.

## The Personalization Specialist

I want you to become my personalization specialist. Your job is to learn everything relevant about me, my work, and my preferences so you can be maximally useful as my AI assistant.

Ask me questions one at a time. Go deep on areas that matter. When you learn something important, explicitly save it to memory.

Areas to explore:

- My role and responsibilities
- Current projects and priorities
- People I work with
- My communication style and preferences
- What I want from an AI assistant
- Pet peeves and things to avoid

When we're done, give me a summary of what you learned and optimized custom instructions I can paste into my ChatGPT settings.

Start now.

## Morning Brief Setup

Create a scheduled task that runs every weekday at 7:00 AM.

Task: Generate my morning brief including:

1. Today's calendar – what meetings do I have and when
2. Top priority – the single most important thing I should focus on
3. Active projects – quick status on anything that needs attention
4. Heads up – anything I should know about (deadlines, prep needed, etc.)

Keep it scannable – I want to read this in 60 seconds.

## Weekly Review Setup

Create a scheduled task that runs every Friday at 4:00 PM.

Task: Generate my weekly review including:

1. Wins - what did I accomplish this week?
2. Projects - status update on each active project
3. Next week - what are the key priorities?
4. Reflection - one thing that went well, one thing to improve

Format it so I can skim in 2-3 minutes.

## Daily Prioritization

Based on what you know about my current projects, deadlines, and goals: what are the 3 highest-leverage things I should focus on today?

For each, tell me:

- Why this matters
- Specifically what "done" looks like
- How long it should take

## Thinking Partner

I want to think through [TOPIC/DECISION].

Here's the situation: [DESCRIBE]

Help me think this through. Ask clarifying questions. Challenge my assumptions. Help me see what I might be missing.

Don't just give me the answer - help me reason through it.

## Project Update

Project update: [PROJECT NAME]

What happened: [DESCRIBE] Current status: [On track / Blocked / Ahead of schedule] Next steps: [WHAT'S NEXT] Any concerns: [BLOCKERS OR RISKS]

Save this to memory and remind me if I haven't updated in a week.

## Email Draft

Help me write an email.

To: [RECIPIENT AND CONTEXT] Purpose: [WHAT I'M TRYING TO ACCOMPLISH] Key points: [WHAT NEEDS TO BE SAID] Tone: [Professional/Casual/Firm/Friendly]

Draft it, then give me a shorter version I can use if I want to be more concise.

## Decision Framework

I need to make a decision about [DECISION].

Options:

1. [Option A]
2. [Option B]
3. [Option C, if applicable]

For each option, analyze:

- Pros
- Cons
- What I might be underweighting
- Reversibility

Then give me your recommendation based on what you know about my priorities.

# Quick Reference

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Keep this handy for quick lookups of key concepts and prompts.

# THE AI PLAYBOOK:

## Quick Reference Card

### CORE PRINCIPLES

- » 1. **Value-Driven:** Solve real problems, don't just adopt tech.
- » 2. **Data Quality First:** Garbage in, garbage out. Invest in clean data.
- » 3. **Human-in-the-Loop:** Augment human decision-making, maintain oversight.
- » 4. **Iterate & Learn:** AI is a journey. Embrace continuous improvement.

### THE 5 WORKFLOWS



### SETUP CHECKLIST

- Define Clear Objectives & Success Metrics
- Audit Data Availability & Readiness
- Select Appropriate AI Tools & Platform
- Assemble Cross-Functional Team (Data, Tech, Domain)
- Establish Governance & Ethics Framework

Establish Governance & Ethics Framework

Plan for Scalability & Maintenance



# What's Next?

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You've now set up:

- Personalized ChatGPT account with memory enabled
- Connected calendar and email integrations
- Custom instructions tuned to your work style
- Scheduled tasks for automated briefings
- A framework for high-leverage AI workflows

**The key from here:** Use it. The system gets better as ChatGPT learns more about you. Update it on your projects, tell it when things change, give feedback when responses aren't right.

**Within 2 weeks**, you'll have an AI assistant that feels like it actually knows you—because it does.

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Questions? Email: [palmer@skylarbpayne.com](mailto:palmer@skylarbpayne.com)

*For the full playbook with templates, workflows, and advanced techniques, visit [aiplaybook.work](http://aiplaybook.work)*



## BONUS: 45-Prompt Pack

Ready-to-use prompts for every business scenario

# AI Playbook Prompt Pack

## 45 Ready-to-Use Business Prompts

Your competitive advantage starts here. These prompts are designed to be copied, pasted, and customized in seconds. Each one is battle-tested for real business scenarios—from solo founders to small teams.

**How to use:** Copy the prompt, replace the **[bracketed sections]** with your specifics, and let your AI assistant do the heavy lifting.

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## 1. Meeting Prep & Follow-Up

### 1.1 Pre-Meeting Brief

I have a meeting in [time frame] with [person/company name] about [topic].

Their background: [what you know about them]

My goal for this meeting: [desired outcome]

Create a one-page brief that includes:

- 3 conversation starters based on their background
- 5 questions I should ask to achieve my goal
- Potential objections they might raise and how to address them
- A suggested agenda that respects their time

## 1.2 Meeting Agenda Generator

I'm leading a [duration] meeting with [number] people about [topic].

Context: [brief background on why this meeting is happening]

Decision needed: [what we need to walk away with]

Create a timed agenda that:

- Starts with a clear purpose statement
- Allocates time for discussion, not just presentations
- Includes specific questions to drive each section
- Ends with clear next steps and owners

## 1.3 Meeting Notes Transformer

Here are my rough meeting notes:

[paste your notes]

Transform these into:

1. A clean summary (3-5 sentences max)
2. Key decisions made
3. Action items with owners and deadlines
4. Open questions that need follow-up
5. A draft follow-up email I can send to attendees

## 1.4 Stakeholder Prep Sheet

I'm meeting with a [stakeholder type: investor/client/partner/executive] who cares most about [what they care about]

My ask: [what you want from them]

Their likely concerns: [what might make them hesitant]

Help me prepare:

- The single most compelling way to frame my ask
- Data points or proof I should have ready
- Questions they'll likely ask and strong answers
- What success looks like from their perspective

## 1.5 Post-Meeting Action Tracker

I just finished a meeting about [topic]. Here's what was discussed:

[paste notes or summary]

Create an action tracker table with:

- Task description
- Owner
- Deadline
- Priority (High/Medium/Low)
- Dependencies

Then draft a brief Slack/email message I can send to the team to share these commitments.

## 2. Email & Communications Drafting

### 2.1 Cold Outreach Email

I want to reach out to [person/role] at [company type] about [purpose].

What I offer: [your value proposition]

Why them specifically: [personalization angle]

Desired response: [what you want them to do]

Write a cold email that:

- Subject line that gets opened (give me 3 options)
- Opens with something about them, not me
- Explains value in their terms
- Has a clear, low-friction CTA
- Is under 150 words

## 2.2 Difficult Conversation Email

I need to send an email about a difficult topic: [situation]

My relationship with this person: [context]

What I need to communicate: [the hard truth]

What I want to preserve: [relationship/outcome goal]

Write an email that:

- Is direct but not harsh
- Acknowledges their perspective
- Clearly states what needs to change or happen
- Offers a path forward
- Maintains professionalism and respect

## 2.3 Follow-Up Sequence

I [met someone at/pitched to/sent a proposal to] [context] and haven't heard back.

Original interaction: [what happened]

Time since: [how long ago]

What I want: [desired outcome]

Write a 3-email follow-up sequence:

1. Gentle nudge (for sending now)
2. Value-add follow-up (for 1 week later)
3. Break-up email (for 2 weeks later)

Keep each under 100 words. Make them progressively more direct but never desperate.

## 2.4 Internal Announcement

I need to announce [news/change] to my team/company.

What's changing: [specifics]

Why: [the reasoning]

Impact on them: [what they need to know]

Tone: [serious/excited/neutral]

Write an announcement that:

- Leads with what matters to them
- Explains the "why" honestly
- Addresses likely concerns proactively
- Includes clear next steps or timeline
- Ends with an invitation for questions

## 2.5 Professional Decline

I need to decline [request/invitation/opportunity] from [who].

Why I'm declining: [real reason]

Relationship importance: [how much I want to preserve this]

Alternative I can offer: [if any]

Write a response that:

- Is gracious but clear
- Doesn't over-explain or apologize excessively
- Keeps the door open (if appropriate)
- Suggests an alternative if possible
- Is brief—under 100 words

### 3. Decision Making

#### 3.1 Decision Framework Builder

I'm facing a decision: [describe the decision]

Options I'm considering:

1. [Option A]
2. [Option B]
3. [Option C, if applicable]

What matters most: [your priorities/values]

Timeline: [when you need to decide]

Help me think through this:

- What are the key criteria I should evaluate each option against?
- What am I not seeing or considering?
- What would need to be true for each option to be the right choice?
- What's the reversibility of each option?
- Give me a recommendation with reasoning

#### 3.2 Pre-Mortem Analysis

I'm about to [decision/launch/commitment].

Assume it's 6 months from now and this has failed spectacularly.

Help me run a pre-mortem:

- What are the 5 most likely reasons it failed?
- What early warning signs should I watch for?
- What can I do NOW to prevent each failure mode?
- What's my "pull the plug" criteria?

### 3.3 Opportunity Cost Calculator

I'm considering [opportunity/investment/commitment].

Resources required: [time/money/energy]

Potential upside: [what you might gain]

What I'd give up: [what you'd stop doing or not pursue]

Help me calculate the real cost:

- What else could I do with these resources?
- What's the opportunity cost of NOT doing this?
- If this works, what new opportunities does it open?
- If this fails, what do I lose besides the direct investment?
- Is there a smaller experiment I could run first?

### 3.4 Stakeholder Impact Analysis

I'm considering [decision/change].

People affected: [list stakeholders]

What I want to achieve: [goal]

For each stakeholder:

- How does this impact them?
- What's their likely reaction?
- What do they need to hear from me?
- When and how should I communicate this?
- What objections might they raise?

### 3.5 Reversibility Assessment

I need to decide: [decision]

Help me assess reversibility:

- If I choose A, how hard is it to switch to B later? What would it cost?
- If I choose B, how hard is it to switch to A later? What would it cost?
- Are there any one-way doors here (irreversible consequences)?
- Given the reversibility, how much analysis does this decision actually deserve?
- Should I just pick one and move fast, or slow down?

## 4. Weekly Planning & Review

### 4.1 Weekly Planning Session

Here's what I have on my plate this week:

Commitments/meetings: [list them]

Projects in progress: [what you're working on]

Deadlines: [what's due]

Energy level: [high/medium/low]

Help me plan my week:

- What are the 3 things that will make this week successful if I complete them?
- What should I intentionally NOT do this week?
- What's the best day/time to tackle my hardest work?
- What can I delegate, batch, or eliminate?
- Where's my buffer time for the unexpected?

### 4.2 Weekly Review Framework

It's the end of my week. Here's what happened:

What I planned to do: [your goals from the week]

What actually happened: [reality]

Wins: [what went well]

Frustrations: [what didn't]

Help me review:

- What did I learn about my priorities?
- Where did I spend time that didn't match my stated priorities?
- What should I do differently next week?
- What do I need to communicate to others based on this week?
- What am I grateful for?

## 4.3 Priority Ruthlessness Check

Here's my current to-do list:

[paste your list]

Be ruthless with me:

- Which of these don't actually need to happen this week?
- Which are "should dos" vs "must dos"?
- Which am I doing because I committed, not because they matter?
- What would happen if I just... didn't do each one?
- What's the ONE thing that matters most?

## 4.4 Energy Management Audit

Looking at my week:

High-energy work I need to do: [creative/strategic tasks]

Low-energy work I need to do: [admin/routine tasks]

My typical energy patterns: [when you're sharpest]

This week's unusual demands: [travel/deadlines/stress]

Help me match tasks to energy:

- When should I schedule deep work?
- What should I batch together?
- Where do I need recovery time?
- What's draining me that I could change?

## 4.5 Delegation Identifier

Here's what's on my plate this week:

[list your tasks]

My hourly value: roughly \$[X] (or what I should be spending time on)

People who could help: [team/contractors/services available]

Identify what I should delegate:

- What's below my pay grade?
- What could someone else do 80% as well?
- What would free up time for my highest-value work?
- What would I need to provide for successful delegation?
- What's holding me back from delegating these?

## 5. Research & Analysis

### 5.1 Market Research Brief

I'm researching [market/industry/niche].

What I already know: [your existing knowledge]

What I need to learn: [specific questions]

How I'll use this: [decision I'm trying to make]

Give me:

- Key market size and growth trends
- Major players and their positioning
- Underserved segments or opportunities
- Risks and headwinds to understand
- 5 questions I should dig deeper on

## 5.2 Competitor Analysis

Analyze [competitor] in comparison to [my business/product].

What I know about them: [your observations]

My positioning: [how you differentiate]

What concerns me: [why you're analyzing them]

Provide:

- Their apparent strategy and target customer
- Their strengths I should respect
- Their weaknesses I could exploit
- How they'd likely respond to [my planned move]
- What I can learn from them

## 5.3 Customer Interview Synthesizer

I conducted [number] customer interviews. Here are my notes:

[paste notes or key quotes]

Synthesize this into:

- Top 3 patterns or themes
- Surprising insights I shouldn't ignore
- Direct quotes I should save for marketing
- Gaps in my understanding to explore further
- Specific product/service implications

## 5.4 Data Interpreter

Here's some data from [source]:

[paste data or describe it]

Help me make sense of this:

- What's the headline finding?
- What's surprising or counterintuitive?
- What's missing from this data that I'd need to draw conclusions?
- What questions does this raise?
- If I had to make one decision based on this, what would it be?

## 5.5 Trend Evaluation

I keep hearing about [trend/technology/method] in my industry.

My business: [what you do]

My concern: [missing out vs. distraction]

My resources: [time/money/attention available]

Help me evaluate:

- Is this relevant to my specific situation?
- What's the actual timeline for this mattering?
- What would it cost to ignore this for 12 months?
- What would it cost to chase this now?
- What's the minimum viable way to stay informed without overcommitting?

## 6. Content Creation

### 6.1 Content Idea Generator

I need content ideas for [platform: blog/LinkedIn/newsletter/etc.].

My audience: [who they are]

What I want to be known for: [your expertise/positioning]

Recent topics I've covered: [avoid repetition]

Formats that work for me: [long-form/short posts/video scripts/etc.]

Generate 10 content ideas:

- 3 that address common questions my audience has
- 3 that share my unique perspective on industry topics
- 2 that tell stories from my experience
- 2 that are contrarian or challenge conventional wisdom

For each, give me: title/hook + one-sentence description

## 6.2 LinkedIn Post Writer

I want to write a LinkedIn post about [topic].

Key point I want to make: [your insight]

Audience: [who should care]

Tone: [authoritative/conversational/vulnerable]

Goal: [engagement/leads/thought leadership]

Write a post that:

- Opens with a hook (first line matters most)
- Uses short paragraphs and white space
- Includes a specific story, example, or data point
- Ends with a question or clear takeaway
- Is optimized for the feed (under 1300 characters for full visibility)

## 6.3 Newsletter Draft

I'm writing my [weekly/monthly] newsletter.

Topic: [what you want to cover]

Subscribers are: [your audience]

My unique angle: [why you specifically should write this]

What I want readers to do after: [CTA goal]

Draft a newsletter that:

- Subject line options (give me 3)
- Opens with a hook relevant to their lives
- Delivers one clear, valuable insight
- Includes a personal touch or story
- Ends with a specific ask or CTA
- Tone: [friendly/professional/casual]

## 6.4 Case Study Framework

I want to create a case study about [client/project].

The transformation: [before → after]

The challenge: [what they were struggling with]

The solution: [what you did]

The results: [outcomes, ideally with numbers]

Create a case study structure:

- Compelling headline that leads with results
- The "before" situation (relatable pain)
- The turning point (why they chose you)
- The process (brief, shows your approach)
- The results (specific and credible)
- The testimonial quote (draft one they could approve)

## 6.5 Content Reposer

I have this piece of content:

[paste original content]

Original format: [blog post/video/podcast/etc.]

Repurpose into:

1. 3 LinkedIn posts (different angles)
2. 10 tweet-length insights
3. 1 email newsletter intro
4. 1 short-form video script (60 seconds)

Maintain my voice and key insights while adapting for each platform's style.

## 7. Hiring & Team Management

### 7.1 Job Post Writer

I'm hiring for a [role title] position.

Key responsibilities: [what they'll actually do day-to-day]

Must-have skills: [non-negotiables]

Nice-to-have skills: [bonus qualifications]

Team context: [who they'll work with, company stage]

Compensation range: [if willing to share]

Write a job post that:

- Opens with what makes this role exciting (not company boilerplate)
- Describes the impact they'll have in the first 90 days
- Lists requirements honestly (no "10 years experience in 5-year-old technology")
- Gives a sense of culture without buzzwords
- Includes a clear application process
- Filters out poor fits with specificity

### 7.2 Interview Question Builder

I'm interviewing candidates for [role].

Key skills I need to assess: [technical and soft skills]

Behaviors that predict success here: [what top performers do]

Red flags I'm watching for: [what hasn't worked before]

Interview length: [time available]

Create an interview guide with:

- 3 behavioral questions (with what "good" answers look like)
- 2 situational/problem-solving questions specific to this role
- 1 question that reveals cultural fit
- 1 question that lets the candidate show their thinking process
- Follow-up probes for each question
- Red flag responses to watch for

## 7.3 Performance Feedback Framer

I need to give feedback to [team member] about [situation/behavior/performance].

Context: [their role, tenure, our relationship]

The issue: [what specifically needs to change]

The impact: [why this matters]

What I want to preserve: [their strengths, our relationship]

Help me structure feedback that:

- Is specific, not vague ("you need to communicate better")
- Describes behavior and impact, not character judgments
- Includes concrete examples
- Offers a clear path forward
- Balances honesty with respect
- Fits a [5/15/30] minute conversation

## 7.4 One-on-One Template

I have a 1:1 coming up with [team member].

Their role: [what they do]

How long we've worked together: [tenure]

Current situation: [any relevant context–projects, performance, morale]

My goals for this conversation: [what I want to accomplish]

Generate a 1:1 structure that includes:

- 2 open-ended questions to understand their current state
- 1 question about obstacles I can help remove
- 1 question about their growth/development
- Space for them to raise topics
- How to close with clear next steps
- Questions to avoid (leading, yes/no, etc.)

## 7.5 Team Retro Facilitator

I'm running a retrospective with my team of [number] people.

What we're reflecting on: [project/sprint/quarter]

Mood of the team: [energized/exhausted/frustrated/mixed]

Time available: [duration]

Format: [in-person/remote/hybrid]

Create a retro format that:

- Gets everyone participating, not just the loud voices
- Surfaces honest feedback (not just "everything's fine")
- Balances celebration with constructive critique
- Results in 2-3 actionable improvements
- Fits our time and energy constraints
- Includes specific facilitation instructions

## 8. Sales & Negotiation

### 8.1 Proposal Builder

I'm writing a proposal for [prospect/client] for [project/service].

Their problem: [what they're trying to solve]

What I'm proposing: [scope of work]

Investment: [pricing]

Timeline: [delivery schedule]

Competition: [who else they might be considering]

Write a proposal that:

- Opens with their problem, not my credentials
- Shows I understand their specific situation
- Outlines deliverables clearly (no ambiguity)
- Justifies the investment with expected outcomes
- Addresses likely objections pre-emptively
- Creates urgency without being pushy
- Includes clear next steps to move forward

## 8.2 Objection Handler

I'm in a sales conversation and facing this objection:

"[exact objection or concern they raised]"

Context: [what you're selling, how far into the conversation]

What I think is really going on: [the underlying concern]

My constraints: [what I can and can't offer]

Give me:

- What this objection usually really means
- 3 ways to respond (direct, reframe, question)
- Questions to uncover what's actually blocking them
- How to know if this is a deal-breaker vs. negotiating tactic
- When to walk away vs. push through

## 8.3 Pricing Conversation Script

I need to discuss pricing with [prospect/client].

What I'm selling: [product/service]

My price: [amount]

Their likely budget: [what I suspect]

My flexibility: [where I can/can't bend]

The value I deliver: [outcomes/ROI]

Help me prepare:

- How to introduce price confidently (without apologizing)
- Anchoring language that frames value before cost
- Response to "that's too expensive" that doesn't immediately discount
- Alternative structures if they can't afford full price
- How to hold firm when needed
- The walk-away point and how to exit gracefully

## 8.4 Deal Follow-Up Sequence

I sent a proposal to [prospect] [timeframe] ago and haven't heard back.

What I proposed: [brief summary]

Last interaction: [what was said]

Their decision timeline: [if known]

Stakes: [how important is this deal]

Write a follow-up approach:

- First follow-up message (gentle, value-add)
- Second follow-up (addresses likely concerns)
- Final follow-up (creates decision point)
- Subject lines for each
- How long to wait between each
- When to stop following up

## 8.5 Negotiation Prep Sheet

I'm entering a negotiation for [what you're negotiating].

Other party: [who they are]

What I want: [ideal outcome]

What I'd accept: [minimum acceptable]

What they probably want: [their likely priorities]

My leverage: [what power I have]

Their leverage: [what power they have]

Help me prepare:

- My BATNA (best alternative if this fails)
- Their likely BATNA
- 3 creative options that expand the pie
- What I can offer that costs me little but they value
- What they might offer that costs them little but I'd value
- Red lines I shouldn't cross
- First offer strategy and rationale

# 9. Project Management

## 9.1 Project Status Update

I need to update stakeholders on [project name].

Current status: [on track/at risk/blocked]

Progress since last update: [what's been done]

Upcoming milestones: [what's next]

Blockers or risks: [what's in the way]

Audience: [executives/team/clients]

Write a status update that:

- Opens with the headline (good or bad news first)
- Uses clear RAG status (Red/Amber/Green) if appropriate
- Highlights accomplishments without padding
- Is honest about problems without catastrophizing
- Clearly states what you need from them (if anything)
- Fits in [2 paragraphs / 1 page / 5 bullet points]

## 9.2 Scope Document Drafter

I'm starting a project: [project name]

Goal: [what success looks like]

Stakeholders: [who's involved]

Timeline: [deadline or duration]

Resources: [team/budget available]

Constraints: [what's fixed]

Create a scope document that includes:

- Project objective (1-2 sentences, measurable)
- In scope (specifically what we WILL do)
- Out of scope (specifically what we WON'T do-be explicit)
- Key deliverables with acceptance criteria
- Major milestones and dates
- Assumptions we're making
- Risks and mitigation strategies
- Sign-off section

## 9.3 Retrospective Action Extractor

We just finished [project/sprint/initiative]. Here are my notes:

What went well: [list]

What didn't go well: [list]

Team feedback: [key comments]

Outcome vs. expectation: [how it compared to plan]

Turn this into:

- 3 things to keep doing (with why)
- 3 things to stop doing (with why)
- 3 things to start doing (with specific actions)
- Owner for each action item
- How we'll know if we've improved
- One-paragraph summary for stakeholders

## 9.4 Stakeholder Update Email

I need to update [stakeholder: executive/client/board member] on [project/initiative].

What they care about most: [their key concern]

News to share: [good/bad/mixed]

Ask I have: [decision needed/resources/support]

Political context: [any sensitivities]

Write an update email that:

- Respects their time (gets to the point fast)
- Leads with what they care about
- Is honest but not alarming
- Clearly states any decision or support needed
- Offers options, not just problems
- Ends with clear next steps

## 9.5 Risk Register Builder

I'm managing [project] and need to identify risks.

Project overview: [brief description]

Timeline: [duration]

Key dependencies: [what we rely on]

Past issues on similar projects: [if known]

Create a risk register that includes:

- 5-7 most likely risks
- Impact rating (High/Medium/Low) for each
- Probability rating for each
- Mitigation strategy for each
- Owner for monitoring each risk
- Trigger indicators (how we'll know it's happening)
- Contingency if the risk materializes

## 10. Personal Productivity

### 10.1 Goal Setting Framework

I want to set goals for [timeframe: quarter/year/90 days].

Areas of life I'm focusing on: [work/health/relationships/finances/etc.]

What I accomplished last period: [context]

What I'm struggling with: [current challenges]

What would make this period feel successful: [gut feeling]

Help me set goals that:

- Are specific and measurable (not vague intentions)
- Include lead indicators, not just outcomes
- Are ambitious but achievable
- Connect to what actually matters to me
- Have clear "done" criteria
- Include weekly check-in metrics

## 10.2 Time Audit Analysis

Here's how I spent my time last week:

[paste your time tracking data, calendar, or estimates]

Analyze my time:

- What percentage went to high-value activities?
- What are my biggest time leaks?
- What patterns do you notice?
- What am I spending time on that doesn't match my stated priorities?
- What would my time allocation look like if my calendar matched my values?
- 3 specific changes to try next week

## 10.3 Habit Design Session

I want to build the habit of [desired behavior].

Why this matters to me: [motivation]

My current routine: [what my days look like]

Past attempts: [what's worked/failed before]

Obstacles I expect: [what might get in the way]

Design a habit system that includes:

- The smallest possible version of this habit (2-minute rule)
- Specific trigger/cue to attach it to
- How to make it obvious, attractive, easy, and satisfying
- What to do when I miss a day
- How to track it simply
- When to upgrade to a bigger version
- 30-day progression plan

## 10.4 Journaling Prompts Generator

I want to start journaling for [purpose: clarity/gratitude/processing/planning].

Time available: [X minutes per day]

When I'll do it: [morning/evening/whenever]

What I'm struggling with right now: [optional context]

Give me:

- 7 prompts (one for each day of the week) that match my purpose
- 3 quick prompts for days when I'm resistant (under 5 minutes)
- 1 weekly reflection prompt for deeper processing
- How to make this stick as a habit
- Signs the journaling is actually helping

## 10.5 Decision Fatigue Reducer

Here are all the decisions I'm currently juggling:

[list your open loops and pending decisions]

Help me reduce decision fatigue:

- Which of these can I decide right now in under 2 minutes?
- Which can I eliminate or delegate?
- Which need more information (and what specifically)?
- Which am I overthinking and should just flip a coin?
- Which are genuinely important and deserve focused time?
- Create a decision queue with timeboxes for each

# 11. Customer Success

## 11.1 Customer Onboarding Sequence

I need to onboard a new customer for [product/service].

What they bought: [specifics]

Their goal: [what they're trying to achieve]

Typical time to value: [how long until they see results]

Common early mistakes: [what trips people up]

My capacity: [how high-touch I can be]

Create an onboarding sequence that includes:

- Day 1: Welcome message (make them feel confident in their choice)
- Day 3: First check-in (ensure they've taken the first step)
- Day 7: Value check (are they seeing early wins?)
- Day 14: Deeper engagement (moving to next level)
- Day 30: Success review (confirm they're getting value)
- Specific templates for each touchpoint
- What to do if they go silent

## 11.2 Check-In Email Templates

I need to check in with a customer: [customer name/type]

Where they are in the journey: [new/active/at-risk/longtime]

Last interaction: [when and what]

Goal of this check-in: [relationship maintenance/upsell/feedback/support]

Any concerns: [if I suspect something's off]

Write a check-in email that:

- Doesn't feel like a template
- Shows I've been paying attention to their usage/situation
- Offers value, not just "checking in"
- Has a soft CTA that's easy to respond to
- Opens conversation without being pushy
- Is under 100 words

## 11.3 Churn Prevention Playbook

I have a customer showing warning signs: [customer name/type]

Warning signs I'm seeing: [decreased usage/complaints/silence/etc.]

Their original goals: [why they bought]

Value they've received: [what's worked]

Relationship history: [touchpoints, sentiment]

Contract status: [when it renews, what's at stake]

Create a save plan:

- Immediate action (within 24 hours)
- Discovery questions to understand what's really going on
- What to offer (without devaluing the product)
- How to have the honest conversation
- Decision tree: what to do based on their responses
- When to let them go gracefully

## 11.4 Upsell Conversation Framework

I want to approach [customer] about [upsell: additional product/higher tier/expanded scope].

Their current situation: [what they have now]

Value they've received: [results from current engagement]

The opportunity: [what more they could get]

Timing: [why now]

Potential objections: [what might hold them back]

Create an upsell approach that:

- Leads with their success, not my quota
- Frames the upsell as the logical next step
- Addresses likely objections proactively
- Includes specific ROI language
- Offers a low-commitment way to explore
- Preserves the relationship if they say no
- Script for the opening of the conversation

## 11.5 Customer Feedback Synthesizer

I've collected customer feedback from [source: surveys/calls/support tickets/reviews].

Raw feedback:

[paste feedback]

Number of customers: [sample size]

Time period: [when collected]

Purpose: [what I'll do with this]

Synthesize into:

- Top 3 themes (with supporting quotes)
- Sentiment breakdown (positive/neutral/negative)
- Quick wins we could act on immediately
- Larger issues that need strategic attention
- Surprising insights or outliers worth investigating
- Recommended priorities with reasoning
- Summary I could share with [team/executives/product]

# Quick Reference Card

When you need to...	Use prompt...
Prepare for an important meeting	1.1 or 1.4
Follow up after a meeting	1.3 or 1.5
Write a tough email	2.2
Decline gracefully	2.5
Make a big decision	3.1 or 3.2
Plan your week	4.1 or 4.3
Understand your market	5.1 or 5.2
Create social content	6.1 or 6.2
Repurpose existing content	6.5
Write a job posting	7.1
Prepare for interviews	7.2
Give difficult feedback	7.3
Run a team retro	7.5
Write a proposal	8.1
Handle sales objections	8.2
Negotiate a deal	8.5
Update stakeholders	9.1 or 9.4
Define project scope	9.2
Set personal goals	10.1
Audit your time	10.2
Build a new habit	10.3
Onboard a customer	11.1
Save an at-risk customer	11.3

