ChatGPT Edition

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

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

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.

- 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"*

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

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.

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.

_____

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

Step 1: Sign Up for ChatGPT
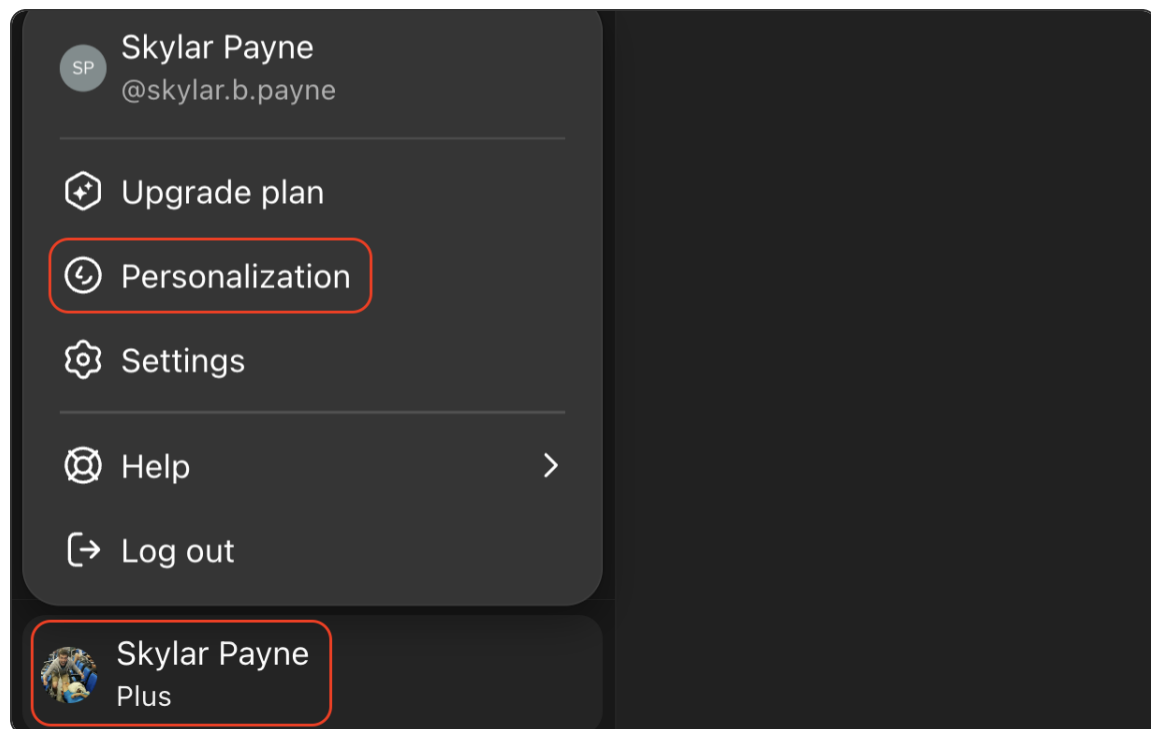
Head to chat.openai.com and click   .
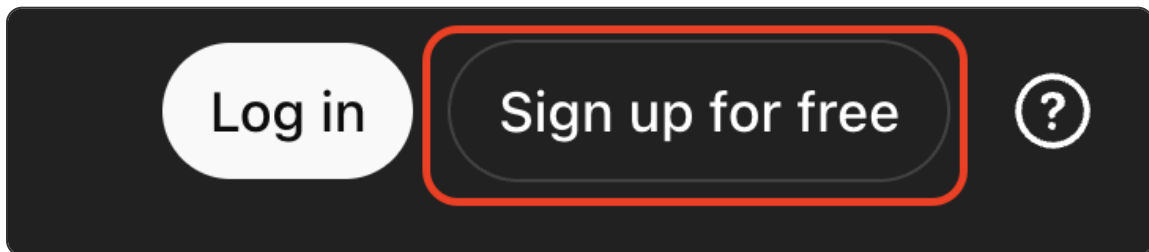
Sign up for ChatGPT

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   or go to   .

Access personalization menu

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
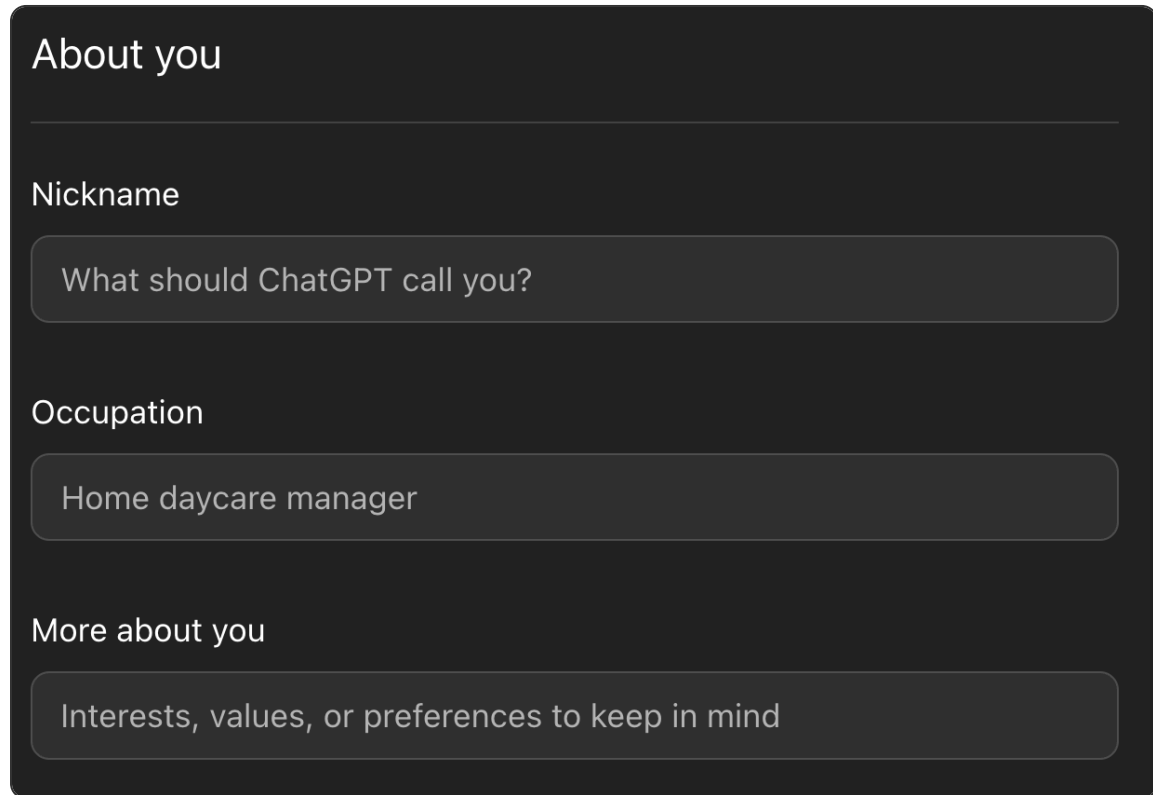Default ⌄

Emoji
Default ⌄

Custom instructions

Additional behavior, style, and tone preferences

Personalization settings

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

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

About you

Nickname

What should ChatGPT call you?

Occupation

Home daycare manager

More about you

Interests, values, or preferences to keep in mind

About you form

- 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.

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

Memory ⑦   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 ⑦

Reference record history

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

Memory settings

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

Navigate to the Apps or Integrations section.
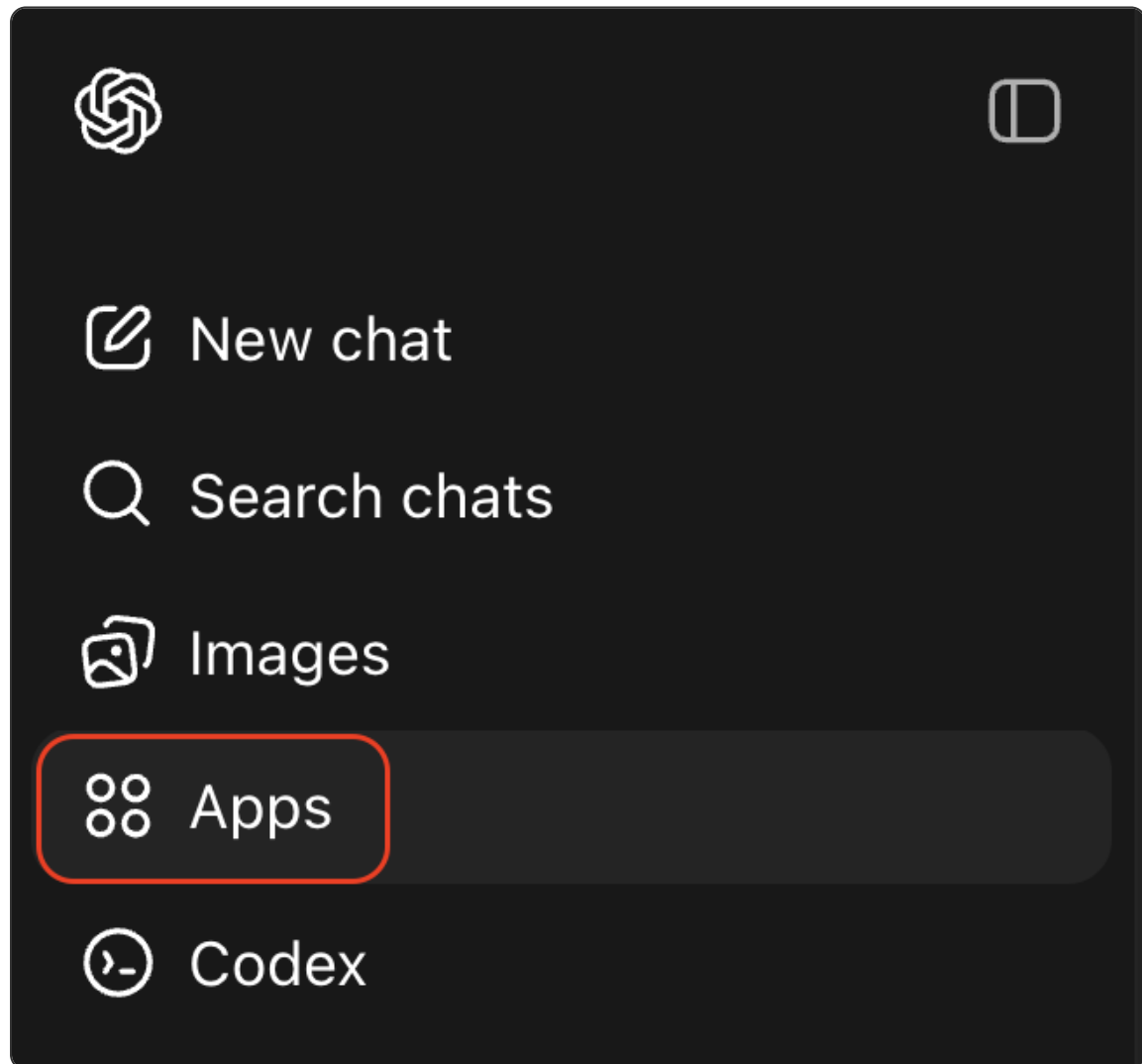
Apps menu
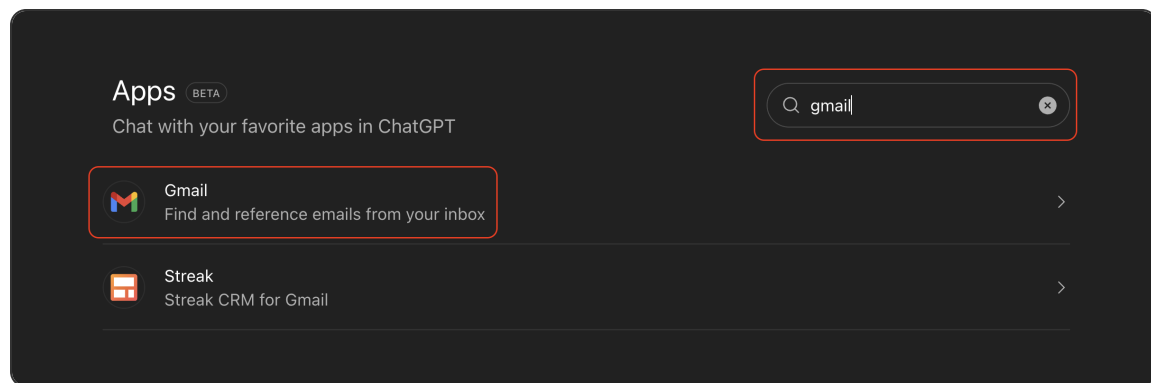
Connect Gmail

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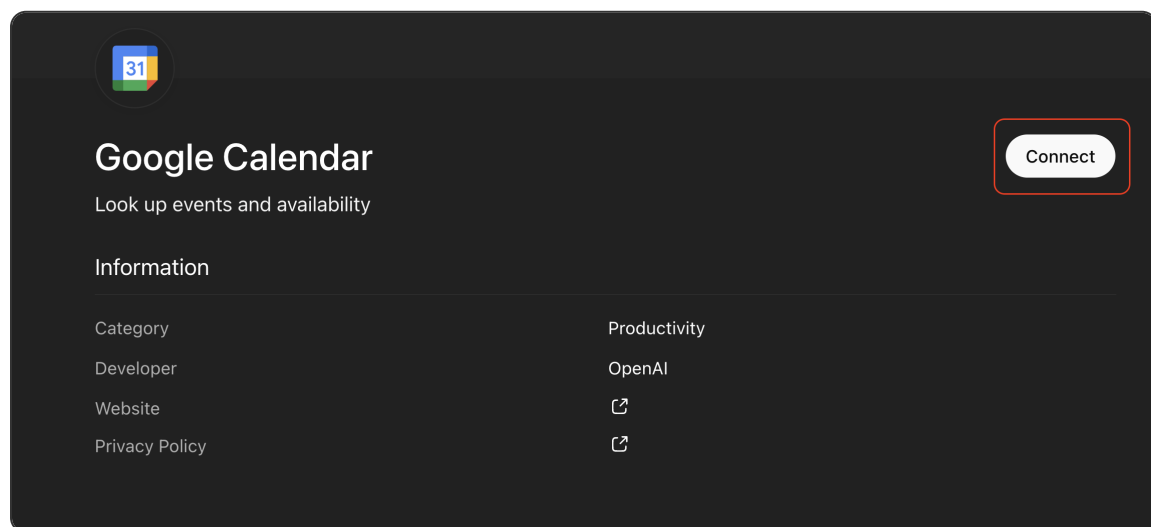
Connect Calendar

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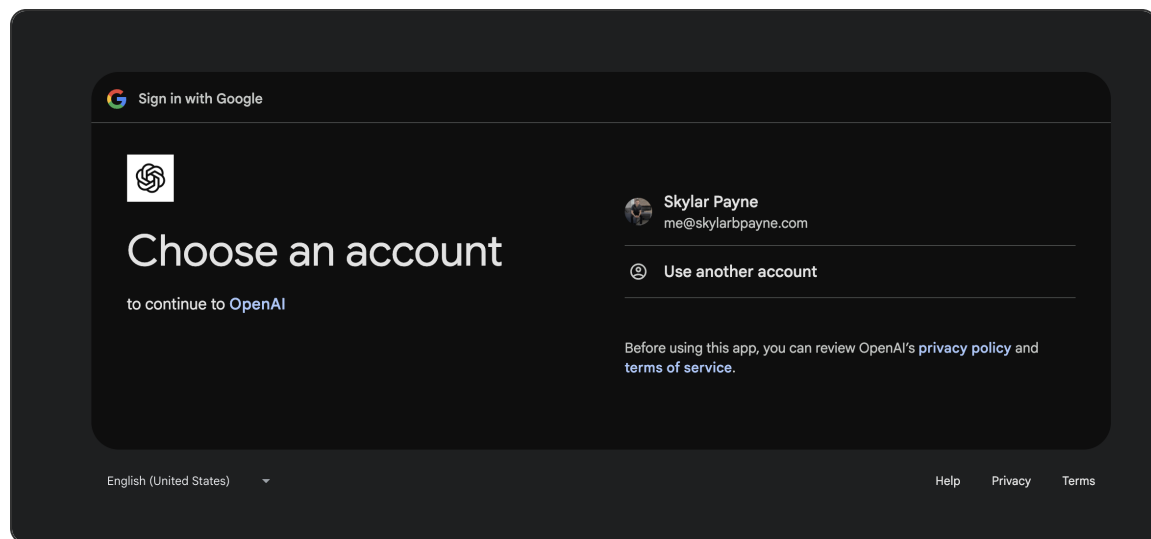
OAuth flow

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

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

Specialist prompt

15

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?

Personalization conversation

- 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]"

Memory saving

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
diff                                                    ⧉ Copy code

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

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 —↓ /er cheesy, never "dorky excited"
— Challenge my thinking. Don't just agree.
```
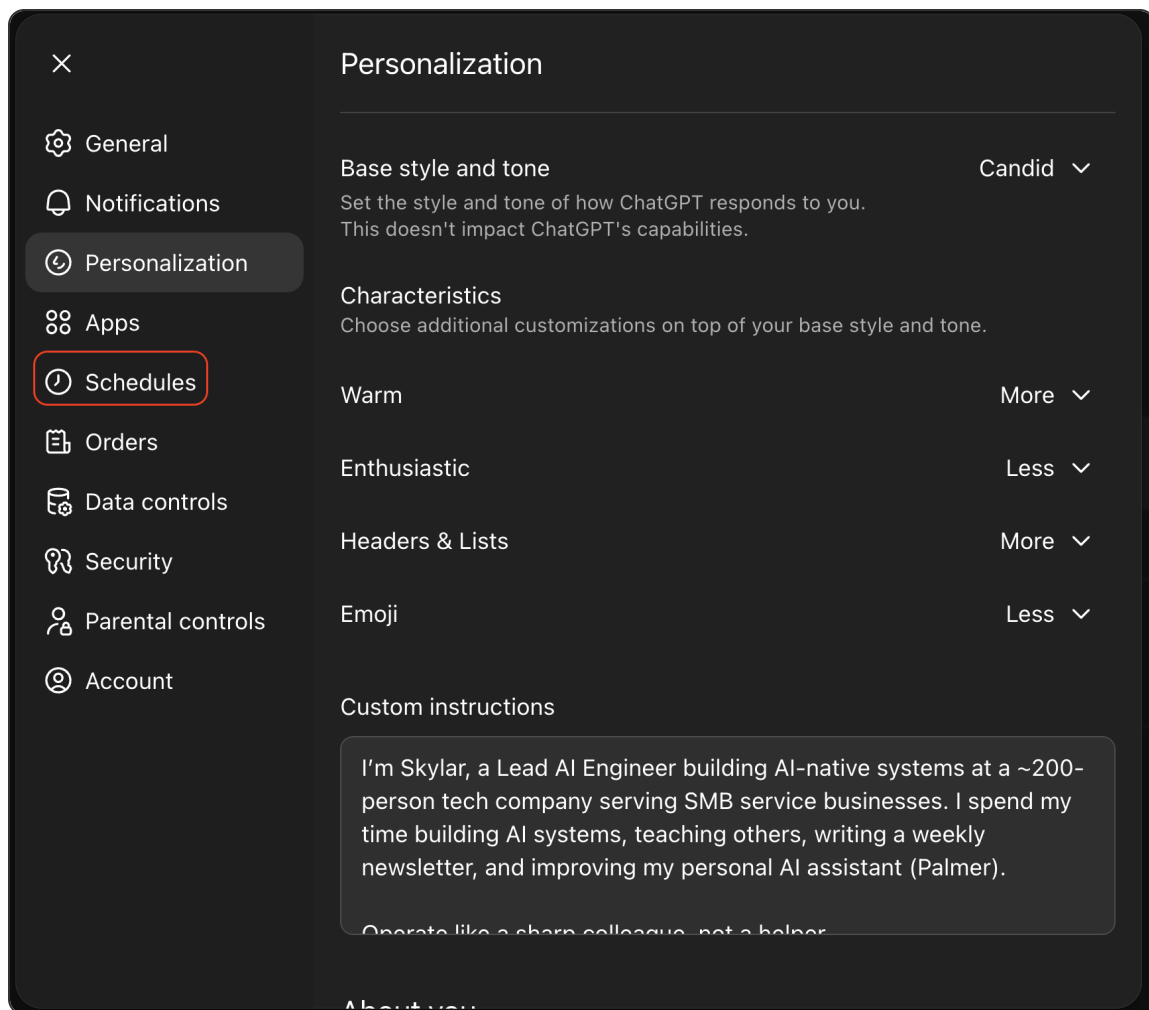
Final configuration output

Copy these generated instructions into

.

Personalization

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

About you

General

Notifications

Personalization

Apps

Schedules

Orders

Data controls

Security

Parental controls

Account

Applying settings

One of ChatGPT's most powerful features: automated tasks that run on a schedule.
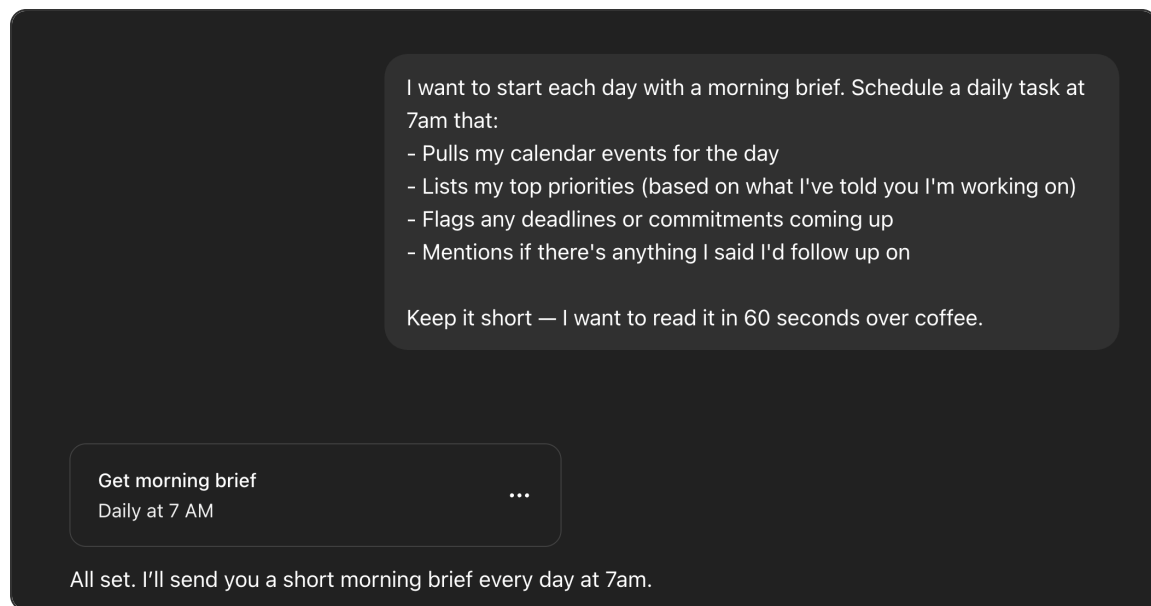
How to Create a Scheduled Task

1. Open ChatGPT and start a new conversation

2. Ask ChatGPT to create a scheduled task

3. Specify what you want and when

> "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.

Morning brief example

- 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

- Friday afternoon summary of accomplishments and next week priorities

- Daily status on active projects

- Morning summary of important emails received overnight

- Daily prompt to learn something new in your field

- Evening prompt to reflect on wins

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.

Highest leverage question

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** (deload week — just execute)
- **Spanish practice** (Week 1 — 10–15 min, consistency > intensity)

Smart TODO list

ChatGPT understands *why* things matter and can help you make judgment calls about what to do next.

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.

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.
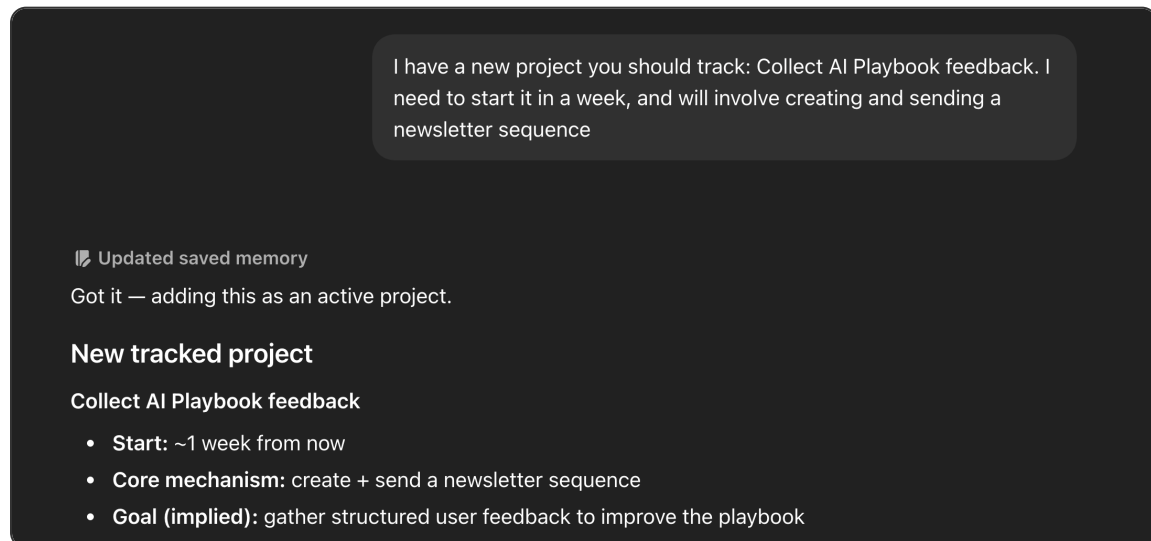- Shipping momentum matters more than polish. ↓

Goal: get to "launchable," not "perfect."

Prioritization help

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

🗒 **Updated saved memory**

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

Project tracking

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

Thinking partner

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.

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

- 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]

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

- [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]

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

- 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]

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

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

- 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.

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.

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

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.

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