

Make AI Work for You

Not the other way around.

Session worksheet · Alicia McQuaig, The Honest Builder

Generic prompt, generic output. Crap in, crap out. The problem was never the tool. The tool doesn't know anything about your business. Today we fix the input.

Pen first: answer the questions below in your own words, then hand your answers to your AI. Messy is fine. Honest beats polished. **One rule:** thin answers get generic help. Talk to it like you're describing your week to a friend. If a stranger could write your answer, it's too thin.

Step 1. Build your AI

Give it one home so it remembers instead of starting from zero every time. Pick where yours lives:

- **ChatGPT:** Settings, then Personalization, then Custom Instructions. Or create a Project and put the instructions there. Free plan includes both.
- **Claude:** create a Project and use the instructions panel. Free plan includes up to five Projects.
- **Copilot:** Settings, then Personalization, then Custom Instructions. If your work account has that switched off, keep one saved setup message and paste it to start each chat. That version works everywhere, always.
- **Any other AI, Gemini, Grok, whatever comes next:** run the same prompt, then save what it writes as a text file. Start each chat by pasting or attaching that file. It's yours forever, and it works on every AI, including the ones that don't exist yet.

The tool doesn't matter. The home does.

Where does yours live?

Step 2. Program the parameters

This is how it works with you. Not your business yet, your working style.

How should it talk to you? Straight shooter or gentle? Short answers or the full picture?

Go deeper: how should it tell you no? What wastes your time in an answer, long intros, hedging, compliments? Formal, or like a coworker?

What should it always do?

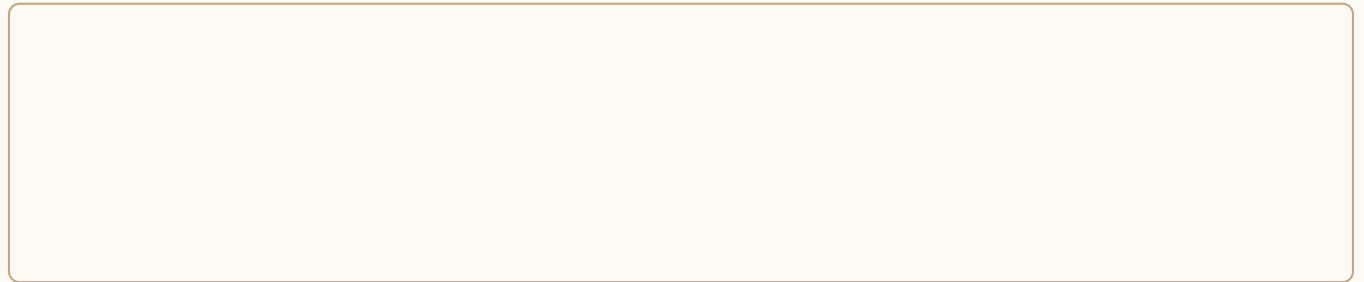
Go deeper: examples: ask before assuming, give me options, show the math, push back when I'm wrong. Tell me which parts are facts and which are guesses. If my request is vague, ask one question instead of guessing.

What should it never do?

Go deeper: examples: jargon, fluff, guessing my numbers, agreeing just to be nice. Think of the last AI answer that made you roll your eyes. What did it do wrong? Never invent a number. Never pad an answer to look thorough.

What job is it doing for you? Adviser, editor, second brain, devil's advocate, all of the above?

Go deeper: when do you want a second opinion? Any time money is involved? Before anything goes to a customer? What should it remember between conversations?



Step 3. Tell it what's important

This is what it needs to know. Actual context instead of a vague brief.

What does your business actually do? Say it plainly, like you would to a neighbour.

Go deeper: walk through one typical order or job, start to finish. Who calls, what they need, what you make, what deadline rules everything. If your business lives and dies by something, event dates, weather, tax season, say so.

Who is your real customer? The one who actually pays you, not the ideal one.

Go deeper: who literally answers the phone? What are they proud of? Why do they pick you over the other guy? And who is NOT your customer? That one is just as useful.

What does a great week look like? What does a bad one look like?

Go deeper: mechanics, not moods. What actually gets stuck, where, and what does it knock over? What does a full schedule look like in real terms?

What are you working toward this year?

Go deeper: how would you know you hit it? A number, a date, a "this stops happening." Vague goals get vague help. But vague is okay here too, you can have your AI work through these goals with you.

What do you find yourself re-explaining every single time? That goes in the setup.

Go deeper: write the exact speech, the way you say it out loud. This becomes the thing your AI explains for you forever.

The master prompt

Used this AI before? Ask it one thing first: **"What do you already know about me and my business?"** Whatever comes back, the prompt below builds on it, or fixes it.

Scan the code on screen, or type this in, or just read your pen answers to your AI in your own words. All three work. Notice the questions match this worksheet exactly. Same interview, paper or screen. This is the free-plan version. On a paid plan? The longer version is on the same page as this download.

"You are going to be my business AI. First: if you already have any memory or saved information about me, tell me what you think you know and let me correct it. Then interview me one question at a time, in this exact order, waiting for my answer each time: 1. How should you talk to me? Straight or gentle, short or detailed? 2. What should you always do? And do not let me be vague here. The answer most people skip is 'tell me when I'm wrong and make the case against my idea before I ask.' It's the one that matters most, so push me on it. 3. What should you never do? 4. What job are you doing for me? Adviser, editor, second brain, devil's advocate? 5. What does my business actually do, said plainly? 6. Who is my real customer, the one who actually pays me? 7. What does a great week look like? A bad one? 8. What am I working toward this year? 9. What do I find myself re-explaining every single time? If my answer is vague, ask one better follow-up before moving on. When you're done, write everything up as a set of instructions I can save so every future conversation starts from what you learned. Keep it under 1,400 characters so it fits in any tool. Build it in this order, and if you run out of room, cut from the bottom: 1) who I am, what my business does, and who I serve. 2) hard rules for how you talk to me, written as commands, not adjectives. 3) what to do when my request is vague. 4) context I would otherwise re-explain every time. 5) formatting preferences. Write rules, not descriptions. 'No corporate jargon' beats 'friendly and approachable' and costs a third of the space. Then tell me three things: exactly where to save this in the tool I am using, what you had to cut to make it fit, and where my answers were thin so I know what to tighten later."

One more step. Tune it up.

Once your AI hands you the instructions, don't stop there. Paste this as its own message, after the interview is done. It makes the AI read what it wrote, find the gaps, and rebuild it in the shape it follows best. Every AI reads a little differently. This makes yours fit.

"Before you use these instructions, do one pass on them. Read every line. Then tell me: 1) anything unclear or that could be read two ways, 2) anything that conflicts with itself, 3) anything missing that you would need to know to actually act like this, and 4) how you would restructure or reword it so you follow it more reliably. Ask me your questions first. Once I answer, give me a clean, reorganized version, in the format that works best for you, keeping my words and meaning intact."

It's going to ask you questions. Answer them. That's the point.

Test drive

Pick one. Run it now on your newly set-up AI. Compare it to what you used to get.

- Draft a reply to an unhappy customer.

- Write a job posting for your next hire.
- Write a social post about what your business does.

That difference you just saw is the whole point.

Keep it alive

- Save the instructions where your tool told you to. That's your AI's memory now.
- When it gets something wrong, that's not failure. That's an instruction you haven't written yet. Add it.
- Stuck? Ask the tool how to use the tool. "What am I missing? How should I be doing this?" It will tell you.
- It's never one prompt. It's a conversation. The messy iterative version is the actual version.

Alicia McQuaig. The Honest Builder. Find me on LinkedIn.