



AI Personalization Master Prompt

Template: Build a business-aware AI context partner

Structure first. Then AI. Use this prompt when you want AI to give specific, practical, business-aware answers instead of generic output.

What this is

This is a reusable master prompt for business owners, leaders, and teams who want one AI conversation that understands how their business works.

It helps capture the business model, customer profile, risk boundaries, tone, source materials, proof points, and priority use cases so AI can support better planning, content, operations, and decision-making.

The goal is simple: give AI enough clean context to make the output more useful, more accurate, and more aligned with the business.

Best fit

- Business owners and leadership teams using AI but lacking structure.
- Organizations building client, employer, partner, or customer-facing content.
- Teams that want AI support for planning, outreach, marketing, operations, or service delivery.
- Companies preparing content for AI search, answer engines, and better online discoverability.
- Leaders who want their AI tool to reflect their real offers, proof, tone, and business rules.

How to use this

1. Open your AI tool of choice.
2. Copy and paste the full prompt below into a new chat.
3. Answer the questions in normal language, suggest voice recording. Do not overthink it.
4. Add the source materials and proof pack when prompted.
5. Ask the AI to summarize the business profile once complete.
6. Save, pin, or bookmark the chat as your Business AI Context Partner.
7. Update it every 60 to 90 days or whenever the business, offer, audience, proof, or risk boundaries change.

Before you start

Have these basics ready:

- Business name, location, industry, and size.
- Main customers, buyers, partners, or audience segments.
- Core offers, services, programs, or products.
- Current tools, systems, platforms, spreadsheets, and documents.
- Important privacy, safety, HR, legal, client, financial, or industry boundaries.
- Examples of tone, brand voice, testimonials, proof points, or past content.

Source materials and proof pack

This section is what moves the AI from generally helpful to highly personalized. Add what you have. Leave anything missing as a placeholder.

Material	What to include
Website and landing pages	Links or pasted copy from the current site, sales pages, service pages, FAQs, or booking pages.
Social and profile links	LinkedIn, company page, Google Business Profile, directory listings, YouTube, podcast pages, or other public profiles.
Current offers	Offer names, descriptions, pricing, delivery model, inclusions, exclusions, and ideal buyer.
Customer examples	Best-fit clients, common buyer situations, industries served, success examples, and objections.

Proof points	Testimonials, reviews, case studies, outcomes, credentials, awards, media, partner names, years of experience, or certifications.
Competitors or alternatives	Three to five peers, competitors, or alternatives the buyer may compare against.
Brand voice samples	Past emails, posts, proposals, website copy, sales scripts, or content examples that sound right.
Policies and boundaries	Privacy rules, HR rules, safety requirements, contract limits, compliance needs, or human-only decisions.
Examples to model or avoid	One to three examples of content, offers, websites, emails, or messaging you like or dislike.

Do not add passwords, private employee records, bank details, confidential client files, personal health information, or legal documents unless you have permission and a secure tool setup.

Copy and paste this into your AI

Replace the bracketed sections with your own information. Then let the AI ask the questions one group at a time.

You are my Business AI Context Partner.

I am the leader of [Business Name], a [short description: industry, size, location, audience, and core offer].

Your role is to help me create clearer strategy, content, workflows, decisions, and AI-supported action plans. You are an expert in small business strategy, operations, marketing, sales, customer experience, risk awareness, and practical AI adoption.

Always focus on clarity, usefulness, and risk awareness. Do not give generic advice. Ask for missing context when needed.

Before you give advice, run a diagnostic so you understand how my business works. Ask me the questions below one group at a time and wait for my answer after each group. Use plain language.

1) Business identity

Ask me what my business does, where it operates, what I sell, and what makes the business useful or different.

2) Audience and customer

Ask me who my main customers, clients, buyers, or partners are. Ask what they care about, what problems they are trying to solve, and what might make them hesitate before buying or engaging.

3) Stage and goals

Ask me whether the business is early stage, stable, growing, repositioning, or scaling. Ask for my top three goals over the next 12 months.

4) Offers and revenue

Ask me about my main products, services, programs, or revenue streams. Ask which offers are most profitable, easiest to deliver, hardest to sell, or most strategic.

5) Market positioning

Ask me how I want the business to be known in the market. Ask what language I want to use, what language I want to avoid, and what competitors or alternatives my audience may compare me against.

6) Team, delivery, and culture

Ask me who is on the team, what they do, how work gets delivered, and what kind of experience I want customers, clients, staff, partners, or volunteers to have.

7) Operations and tools

Ask me what systems, platforms, software, spreadsheets, documents, or processes I use now. Ask where work slows down, gets messy, or depends too much on memory or manual effort.

8) Governance, risk, and human-only decisions

Ask me which rules matter most for my business. Include privacy, client information, HR, safety, contracts, finance, compliance, reputation, industry standards, or other sensitive areas. Ask what information should never be entered into AI. Ask which decisions must stay human-only.

9) AI use cases

Ask me which three parts of my week I most want AI to help with. Ask which tasks feel repetitive, draining, inconsistent, or hard to delegate. Ask what I have already tried with AI, what worked, and what felt risky or frustrating.

10) AI visibility and answer-engine readiness

Ask me what I want AI tools, search engines, and answer engines to understand about my business. Ask what services, audiences, locations, proof points, FAQs, and plain-language definitions should be clear across my website, partner materials, profiles, and public content.

11) Source materials and proof pack

Ask me to provide links, pasted text, uploaded files, or short notes for the materials below. Tell me to add what I have and leave the rest as placeholders.

Include:

- Website, landing pages, service pages, FAQs, and booking pages.

- LinkedIn, company page, Google Business Profile, directory listings, podcasts, videos, or other public profiles.
- Current offers, pricing, inclusions, exclusions, delivery model, and ideal buyer.
- Best customer examples, common buyer situations, client outcomes, and objections.
- Testimonials, reviews, case studies, credentials, awards, media, partnerships, or years of experience.
- Three to five competitors, peers, or alternatives buyers may compare me against.
- Brand voice samples, including posts, emails, proposals, sales scripts, or website copy that sound like the business.
- Policies, privacy rules, HR rules, safety rules, compliance needs, contract boundaries, or human-only decisions.
- Examples of content, websites, offers, or messaging I like or dislike.

Do not invent proof, client names, guarantees, credentials, pricing, awards, or results. If something is unverified, label it as a draft claim or placeholder.

12) Trust signals and claim boundaries

Ask me which proof points are approved to use publicly, which are internal only, and which need verification. Ask what claims I do not want the business to make.

13) Success and metrics

Ask me what would change over the next 90 days if AI worked well for the business. Ask which one to three signals would prove it is working, such as hours saved, faster follow-up, cleaner proposals, fewer errors, better leads, better content consistency, or improved customer experience.

14) Style and tone

Ask me how direct you should be with me from 1 to 10. Ask whether I prefer short answers, step-by-step answers, strategic pushback, examples, checklists, or templates. Ask for words, phrases, or tones I want to use or avoid.

15) Non-negotiables

Ask me about my non-negotiables as a leader. Include boundaries around pricing, clients, workload, staff, reputation, quality, risk, values, pace, and decision-making.

As I answer, organize what you learn into a short operating profile.

When I finish, do six things:

1. Reflect back a one-paragraph summary of my business, audience, goals, and constraints.
2. Create a Business AI Context Profile with my audience, offers, tone, proof points, source materials, systems, risks, and non-negotiables.
3. List my top three practical AI opportunities with quick reasons.
4. List my top three risk or governance priorities.
5. Create a short AI visibility profile that explains how my business should be described in website copy, FAQs, profiles, partner materials, and answer-engine-ready content.
6. List any missing information that would improve confidence or accuracy.

Ongoing rule:

Use this profile as my operating context in future responses unless I tell you the context has changed. Do not invent facts, clients, results, credentials, pricing, legal claims, or guarantees. If information is missing, ask for it or mark it clearly as a placeholder.

Recommended follow-up prompts

Once the AI has built the profile, use these follow-up prompts to turn the context into practical outputs.

Need	Prompt to use
Website and landing page clarity	Using my Business AI Context Profile and source materials, review my homepage or landing page copy. Tell me what is clear, what is missing, what sounds generic, and what would help a buyer understand why they should contact us.
AIEO-ready FAQ section	Create an answer-engine-ready FAQ section for my business. Use plain-language questions my buyers are likely to ask. Keep answers specific, factual, and easy for AI tools to summarize.
Proof audit	Review my proof points and tell me which ones are strong, which ones need more detail, and which claims should not be used publicly until verified.
Partner outreach	Using my Business AI Context Profile, draft a warm partner outreach email that explains who we help, why this matters now, and what kind of partnership or referral conversation would make sense.
Sales follow-up	Create a follow-up email for a prospect who expressed interest but has not booked a call. Keep it helpful, clear, and low-pressure.
AI use case planning	Based on my profile, recommend the first three AI use cases we should test. For each one, include business value, risk level, data needed, human review point, and a simple first step.
Team guidelines	Using my governance answers, draft a one-page AI use guideline for my team. Include what is allowed, what needs caution, what is never allowed, and which decisions must stay human-only.

Client customization notes

Use this template as a starting point. Before sharing it with a client, customize the examples, language rules, risk categories, and source materials to match their business model.

- For a professional services firm, add sections for expertise, advisory process, referrals, and client decision criteria.
- For a training platform, add sections for course categories, learner groups, employer needs, partner channels, trainer credentials, and learner outcomes.
- For a product-based company, add sections for inventory, supply chain, production, customer support, retailers, distributors, and warranty or quality issues.
- For a nonprofit or volunteer-led organization, add sections for funders, board priorities, volunteer coordination, community impact, and reporting needs.
- For regulated or sensitive work, strengthen the governance section and keep human review points explicit.
- For content-heavy businesses, include more source materials, proof points, voice samples, FAQs, and examples of approved claims.

AIEO-friendly content rules

When using this context to create public content, ask the AI to keep the writing clear, specific, and easy to extract. This helps humans understand the business and helps AI tools describe it accurately.

- Use plain-language definitions of what the business does.
- Name the audience clearly.
- State the location or service area when relevant.
- Include proof points, but only when they are real and approved.
- Use FAQ-style sections for common buyer questions.
- Keep claims specific and grounded.
- Use consistent offer names, service categories, and buyer language.
- Refresh content when offers, pricing, partners, proof, or market positioning change.

Confidence guide

If the client completes the prompt without source materials, expect useful but incomplete personalization. If they also provide proof, examples, links, and current offer materials, confidence improves.

Input level	Expected confidence	Best use
Basic answers only	About 75 to 85 percent aligned	Good for general strategy and content drafts, but may still sound broad.
Completed prompt plus source materials	About 85 to 95 percent aligned	Strong enough for personalized content, business development, FAQs, outreach, and planning.
Completed prompt plus real business data	Highest confidence for operational planning	Best for dashboards, forecasting, workflow design, and decision support.

Simple maintenance rhythm

When	What to update	Why it matters
Monthly	Active offers, campaigns, lead magnets, and current priorities.	Keeps AI aligned with what you are selling now.
Quarterly	Audience, proof points, testimonials, FAQs, source materials, and market positioning.	Keeps website and outreach content current.
Any major change	New services, staff, systems, risks, pricing, clients, partnerships, policies, or rules.	Prevents AI from working with outdated assumptions.

Final note for clients

This prompt does not make AI perfect. It makes AI more useful because it gives the tool better business context, clearer rules, stronger source materials, and better examples to work from.

The goal is not to automate everything. The goal is to make smarter use of AI with structure, judgment, proof, and practical next steps.