

My AI Operating Instructions

A guided worksheet for telling AI how to work with me

Save this file as:

My AI Operating Instructions.docx

What this document is:

This document gives AI the rules of the road for working with you. It tells AI what to prioritize, what to avoid, what kinds of tasks it can help with, and what guardrails matter for your business.

How to use this document:

Answer the questions in practical language. This does not need to sound formal. Keep the questions and your answers in the document. When finished, save the completed file and upload it as a source in your ChatGPT project.

Important reminder:

This document is not a replacement for your broker, manager, attorney, lender, CPA, or compliance department. It is a way to remind AI how to help you responsibly and consistently.

Section 1: Top Priority Rules

Start with the few instructions AI should remember above everything else.

1. What is the most important rule AI should follow when helping you?

Examples: sound like me first, be clear before being clever, protect the client, keep it simple, avoid hype.

Your answer:

2. When AI is unsure what you mean, what should it do?

Examples: ask a question, make a reasonable assumption and label it, give options, start with a rough draft.

Your answer:

3. What should AI prioritize when creating content for you?

Examples: clarity, accuracy, warmth, brevity, education, compliance, practical next steps.

Your answer:

4. What should AI avoid doing even if it might make the content sound more polished?

Examples: exaggerating, sounding salesy, making guarantees, using buzzwords, writing too much.

Your answer:

Section 2: What AI May Help With

List the kinds of work where AI can be useful for you.

5. What kinds of writing or business tasks may AI help you create?

Examples: emails, texts, social posts, video scripts, listing descriptions, handouts, newsletters, class outlines, follow-up systems.

Your answer:

6. What kinds of brainstorming or planning may AI help with?

Examples: marketing ideas, client education plans, packet outlines, event planning, content calendars, follow-up sequences.

Your answer:

7. What tasks should AI not do for you?

Examples: draft contract language, give legal advice, make financial promises, replace professional guidance, speak on behalf of my broker without review.

Your answer:

8. When should AI create a polished draft, and when should it only give ideas or an outline?

Your answer:

Section 3: Voice and Quality Rules

These instructions help AI create work you would actually use.

9. What should AI do to make writing sound more like you?

Examples: use plain language, keep it conversational, teach first, avoid corporate wording, keep paragraphs short.

Your answer:

10. What should AI do when a draft sounds too generic?

Examples: rewrite it in my voice, make it more specific, remove buzzwords, add practical detail, make it warmer.

Your answer:

11. How should AI handle rough ideas you give it?

Examples: preserve my intent, clean it up, organize it, do not replace my voice, ask before changing the meaning.

Your answer:

12. What level of polish do you usually want?

Examples: clean but still human, professional but not stiff, simple and clear, ready to copy/paste.

Your answer:

Section 4: Compliance and Professional Guardrails

Add any rules that help AI avoid creating risky or inaccurate content.

13. What brokerage, company, or professional compliance rules should AI remember?

Include advertising rules, brokerage name requirements, title usage, logo rules, or approval requirements.

Your answer:

14. What words or claims should AI avoid for compliance or accuracy reasons?

Examples: guarantee, free, best, expert if not appropriate, seller pays my commission, legal advice, tax advice.

Your answer:

15. What disclaimers, notices, footers, or required links should AI include when appropriate?

Your answer:

16. What topics should AI handle with extra caution?

Examples: fair housing, commissions, financing, contracts, school quality, crime, legal issues, taxes, inspections.

Your answer:

17. When should AI tell you to confirm with a broker, attorney, lender, CPA, inspector, or other professional?

Your answer:

Section 5: Client Communication Rules

Explain how AI should help you communicate with clients and prospects.

18. How should AI write client emails for you?

Examples: clear subject line, warm opening, short explanation, next step, natural sign-off.

Your answer:

19. How should AI write text messages for you?

Examples: short, friendly, practical, easy to reply to, not too much detail.

Your answer:

20. How should AI handle sensitive or stressful client situations?

Examples: calm tone, clear options, do not blame, avoid overpromising, help me protect the relationship.

Your answer:

21. What follow-up style fits you?

Examples: gentle, direct, relational, helpful, persistent but respectful.

Your answer:

22. What should AI remember about referrals and relationship-building?

Your answer:

Section 6: Branding and Marketing Rules

Include basic preferences that should shape marketing content. More detailed brand guidelines can be uploaded separately.

23. What name, title, slogan, or personal brand wording should AI use or avoid?

Your answer:

24. What hashtags, calls to action, or recurring phrases should AI use when appropriate?

Your answer:

25. What should AI remember about your photos, logos, colors, design preferences, or visual style?

You can keep this simple if you plan to upload separate brand guidelines.

Your answer:

26. What kind of marketing do you not want to create?

Examples: fear-based, gimmicky, pushy, too flashy, too much scarcity, too much self-promotion.

Your answer:

Section 7: Business Goals and Strategy

These answers help AI connect its work to your actual business plan.

27. What are your current business goals?

Examples: number of transactions, income goal, listing goal, buyer goal, database growth, event attendance.

Your answer:

28. What client groups or lead sources should AI help you focus on?

Examples: sphere of influence, referrals, first-time buyers, sellers, expired listings, past clients, community groups.

Your answer:

29. What repeatable systems are you trying to build?

Examples: email series, client packets, monthly mailers, video series, workshop follow-up, listing follow-up.

Your answer:

30. What should AI remember about your preferred calls to action?

Examples: schedule a consultation, reply to this email, introduce me to someone, download this resource, attend a class.

Your answer:

Section 8: Preferred Vendors, Partners, and Resources

Use this section if AI may recommend or mention people and resources in your materials.

31. Who are your preferred vendors or referral partners, and when should AI mention them?

Your answer:

32. Are there company tools, client resources, websites, forms, or links AI should suggest when appropriate?

Your answer:

33. Are there vendors, tools, or resources AI should not mention unless you specifically ask?

Your answer:

Section 9: Final Instructions

End with anything else AI should know before helping you.

34. What should AI always do before delivering important work?

Examples: proofread, simplify, check tone, ask if something is missing, make it copy/paste ready.

Your answer:

35. What should AI never do when working with you?

Your answer:

36. If project sources conflict with each other, how should AI handle that?

Examples: prioritize the most recent source, ask me, follow compliance documents first, explain the conflict.

Your answer:

37. What other instructions would make AI more useful to you?

Your answer:

Final Step

When you are finished, save this completed document as My AI Operating Instructions.docx and upload it to your ChatGPT project as a source. You do not need to delete the questions. The questions help AI understand what your answers mean.