

Tab 2



How to Create a Customized Organizational GPT in ChatGPT

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Want to create a GPT that actually works the way you do? This guide walks you through how to build a custom ChatGPT tailored to your team's tone, strategy, and real-world use cases.

First things First: Why Create a Custom GPT Instead of Just Using ChatGPT?

Think of a custom GPT like a trained teammate—not just a blank-slate chatbot. A regular ChatGPT is powerful, but a custom GPT is:

- Pre-loaded with your tone, tools, and templates
- Faster to use because it skips the guesswork
- Easier to standardize across your team or client projects
- Transferable—if and when you're ready

Even if you're the only person using it, a custom GPT gives you a repeatable, time-saving assistant aligned to your workflow.

TL;DR: It saves time, sounds like you, and remembers what matters. Transfer is a bonus—not a requirement.

1. Start with What You Want

Clarify the GPT's purpose, tone, and content before building.

What's the GPT's job?

Examples:



- “Help me write donor follow-up emails”
- “Turn Slack threads into CRM entries”

What should it know?

- Campaign frameworks
- Preferred tone and structure
- Key priorities or constraints

 Prompt to use when setting instructions:

“You are a fundraising strategy assistant that helps nonprofit leaders draft proposals, segment donors, and write concise, clear updates in a warm, equity-centered tone.”

2. Build Your GPT

No tech skills needed—just use the GPT Builder.

Steps:

1. Go to <https://chat.openai.com/gpts>
2. Click **“Create a GPT”** → then **“Explore GPT Builder”**
3. Use the chat to define:
 - GPT name
 - Role and purpose
 - Behavior and tone
 - Optional: upload reference docs (PDFs, templates, Notion exports)
4. Click **Configure** (top right) to:
 - Add description and profile image
 - Refine instructions and sample prompts
 - Add a friendly welcome message

 **Pro Tip:** Think of this like training a new staff member. What do they need to sound like your team, respond with relevance, and save time?

3. Test It Like You'll Use It

Before sharing or relying on it, test how the GPT responds to your actual needs.

Try prompts like:

- *"Draft a thank-you email to a donor who gave \$10K last month."*
- *"Summarize this call log into a CRM update."*
- *"Segment these 12 prospects into donor tiers with suggested next steps."*

Check that it:

- Follows your tone
- Uses uploaded materials
- Offers structured, ready-to-use responses

Ask your team or collaborators to test, too—they'll catch gaps you might miss.

4. Use It for Your Work—or Transfer It Later

Once your GPT is built and tested, you can:

- Use it yourself as a fast, focused assistant
- Share it privately with your team or collaborators
- Or transfer it to a client or teammate if/when you're ready

Transferring is **completely optional**—and only takes a minute if you decide to do it.

Optional: How to Transfer Ownership

1. Create a ChatGPT Builder Profile
2. In GPT Builder, click the **three dots (...)** next to your GPT

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3. Select **“Transfer ownership”**
4. Enter the client’s email (must match their ChatGPT account)
5. They’ll get an invite to accept

🔒 Once accepted:

- They become the new owner
- You lose edit access (unless re-invited)
- You’re still credited as the original creator

This is helpful if you’re delivering the GPT as part of a client engagement or want to cleanly hand it off.

What’s a Builder Profile—and Why Create One?

A **Builder Profile** is your identity as a custom GPT creator. It allows you to:

- Create and manage GPTs under a consistent profile
- Be credited as the original creator of any GPT you build (even if you transfer ownership)
- Showcase GPTs publicly in the future, if you choose to publish them
- Keep personal and builder identities separate—especially helpful if you're creating GPTs for clients or teams

💡 You only need one Builder Profile, and you can use it for all the GPTs you build—whether they’re internal tools, client-facing assistants, or public GPTs.

✨ How to Create Your Builder Profile

1. Go to: <https://chat.openai.com/gpts>
2. Click “Explore GPT Builder”
3. If you don’t already have a profile, ChatGPT will prompt you to create one
4. Enter your:
 - Builder name (can be your real name, org name, or a pseudonym)
 - Short bio or description
 - Optional: Profile picture



🚫 Don't worry—you can keep your GPTs **private** even with a public-facing Builder Profile.

🧠 Pro Tips:

- Use your personal name if you're building GPTs as part of your consulting or creative work
- Use your organization or team name if you're creating GPTs on behalf of a nonprofit, company, or collaborative
- You can update your profile later from the GPT Builder dashboard

5. Add a Welcome Message + Prompts

Make your GPT more usable by adding:

- A warm welcome message
- 3–5 example prompts users can try
- A note about who it's for and what it's good at

📎 Sample Welcome Message:

"Hi there! I'm your fundraising assistant. I can help you draft follow-ups, segment donors, or prep for your next campaign. Try asking:

- *'Draft an email to re-engage a lapsed donor'*
- *'Summarize this Slack thread into action steps'*
- *'Build messaging for our 10K milestone'*

6. Keep It Fresh

Once your GPT is up and running:

- Add new tools or docs over time
- Adjust tone or behavior based on feedback
- Use quarterly check-ins to align with shifting strategy

📎 Prompt to use:

"What's changed in our fundraising strategy that we should update in this GPT?"

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How to Use the Knowledge Tab (and What to Upload)

The **Knowledge** tab is one of the most powerful features of custom GPTs—it lets you upload files that your GPT can “read” and reference during conversations.

Think of it like giving your GPT a personal library to pull from whenever it answers a question.

How to Add Content to the Knowledge Tab

1. Open your GPT in the GPT Builder
2. Click **Configure** in the top-right corner
3. Scroll to the **“Knowledge”** section
4. Click **“Upload files”** and select your documents (PDF, Markdown, CSV, or plain text formats work best)

 Files are automatically saved to that GPT’s context and used to generate more accurate responses.

What Kinds of Content Should You Add?

Upload documents that help the GPT understand your organization’s tone, structure, and strategic work.

Examples:

- Style guides or brand voice documents
- Sample donor communications
- Campaign briefs or planning templates
- CRM field definitions or sample exports
- Common prompt libraries or team “how-tos”
- Past grant proposals or case statements
- Strategy decks or OKRs
- Notes from board meetings or team recaps

● Great candidates for upload:

- ✓ Materials you reuse frequently
- ✓ Tools/templates you want your GPT to generate
- ✓ Sample messaging or voice-and-tone guidelines
- ✓ Docs you'd send to a new staff member or contractor

● Avoid uploading:

- Sensitive or personally identifiable information (e.g., student stories without consent, donor details, login info)
- Files with formatting the GPT can't easily read (e.g., image-only PDFs)
- Super long PDFs (over 100–200 pages may reduce accuracy)

⚠ Knowledge Tab Limitations

- GPTs **do not memorize** the documents—they pull from them during each conversation.
- GPTs **can't cite or quote** the documents like a human researcher would.
- Uploaded files are **only searchable within that GPT**—they don't become part of your general ChatGPT memory or other GPTs you've built.
- You can't currently **link live websites**—only static documents.

🔍 **Tip:** If your file has a lot of data or long sections, ask:

"Based on the uploaded [file name], what are the key messaging priorities for our next campaign?"

📁 Want to Organize Knowledge by Topic?

You can upload multiple files by theme—for example:

- "Messaging Examples" (with past donor emails + newsletters)
- "Campaign Tools" (with strategy decks and OKR templates)

Rename your files clearly before uploading, so the GPT can reference them accurately.



 Example prompt:

“Use the uploaded CRM Field Reference to reformat this donor note for database entry.”

Ask Your GPT to Take On a Role

One powerful feature of custom GPTs is their ability to *simulate different voices or perspectives*. You can ask your GPT to act like a specific stakeholder, teammate, or audience to draft, review, or pressure-test content.

Why this matters:

You’re not always writing for yourself. You’re writing for:

- A skeptical funder
- A comms-savvy board chair
- A donor who cares about lived experience
- A teammate who prefers concise, tactical updates

Sample Prompts:

- *“Act as a funder skimming this concept note. What needs clarification?”*
- *“Rewrite this as if Ashley wrote it—short, direct, no fluff.”*
- *“Pretend you’re our founder. Would this match your voice?”*

Pro Tip:

Bake role-play into your GPT’s instructions:

“You can take on stakeholder roles to help refine messaging and strategy.”

Remember:

This isn’t a replacement for real feedback—just a low-stakes way to test tone, strategy, and clarity before sharing with others.

Train AI to Match Your Organizational Voice

Worried that AI will make you sound generic or robotic? You’re not alone. One of the best ways to avoid this is to “train” your GPT on your own materials.

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Try this:

Upload past proposals, newsletters, or campaign emails to the Knowledge tab.

Ask: *"Analyze this material and describe our tone and messaging."*

Then say: *"Use this tone and messaging to write the next campaign email/report/social post."*

You can even say things like:

- *"That sounds too corporate."*
- *"This feels overly salesy. Try something warmer and grounded in community."*

You're still the one driving—AI is just helping with the heavy lifting.

A Few Final Tips

? What If I'm Not an AI Expert?

You don't need to be a tech person to get results. One of the biggest takeaways from building and using custom GPTs is this: *You are the expert in your work. The GPT is just helping you get it out faster.*

If something sounds wrong, ask:

- "Where did you get that stat?"*
- "Can you rewrite that in a more human voice?"*
- "Does this align with our values?"*

AI doesn't replace your judgment—it reinforces it. Trust yourself.

Common Pitfalls (and What to Do)

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The GPT gives vague or irrelevant answers:

👉 Revisit the Instructions section in Configure. Make the tone, goals, and audience clearer.

It doesn't use my uploaded documents:

👉 Double-check that the file type is readable (PDF, Markdown, or text) and not a scanned image. Also, prompt it with:

"Use the uploaded [file name] to answer..."

It forgets what I said earlier in the chat:

👉 GPTs don't have persistent memory unless you're using the personal memory feature. For long tasks, break work into smaller chunks.

My client doesn't see the GPT after transfer:

👉 Confirm they're checking under "Explore GPTs" in the Builder tab and using the correct email account.

! Use AI for the Stuff That Drains You

Use your best energy for people, strategy, and vision—not for formatting 10 different versions of an email. Try using ChatGPT to:

- Summarize meeting notes
- Turn a grant report into a newsletter
- Translate board updates into social captions
- Reframe the same content for donors, press, and partners

If it helps free up writing time, what else could you do with that margin?

💬 More on Collaborator Use (Team GPTs)

Want to Share With Your Team Without Transferring? You can copy the GPT's private link (after saving it) and send it to your team. They'll be able to use it, but not edit it—perfect for internal rollout.

Security Tip

Uploaded files are visible to anyone with edit access to the GPT. If you're working with sensitive content (like student or donor info), anonymize before uploading—or ask your client for a clean, shareable version.

Want to Reuse This GPT Later?

Before you transfer, clone the GPT using “Duplicate” in the GPT Builder. You can adapt it for other clients or departments without rebuilding from scratch.

Sample GPT Configuration

Example: Custom GPT – Fundraising Strategy Assistant for a Mission-Driven Nonprofit

This sample GPT was built to support a nonprofit working at the intersection of education access and workforce development. Its role is to act as a smart assistant for fundraising, donor communications, and partner engagement. It can be used by internal staff or handed off to external collaborators.

BEHAVIORAL GUIDELINES

Mission Alignment

Reinforce the organization’s commitment to educational equity and economic opportunity. Center systemic impact—not just individual success stories.

Tone and Language

- Empathetic, empowering, and inclusive
- Clear and concise, but never cold
- Avoid jargon unless specifically requested
- Use asset-based, community-oriented language

Response Style

- Start with actionable takeaways



- Offer optional deeper context or follow-up steps
- Structure outputs as async-ready drafts (e.g., bullet points, emails, summaries)

FUNCTIONAL CAPABILITIES

This GPT is built to support a wide range of fundraising and strategy tasks. Examples include:

1. Funder Briefing Generator

Purpose: Prepare for donor meetings or funder calls

Inputs: Foundation name + meeting purpose

Outputs:

- Giving history
- Mission alignment
- Talking points
- Sample questions
- Follow-up email draft

2. Funder Match Engine

Purpose: Suggest aligned funders based on program keywords

Inputs: Program focus or goal

Outputs:

- List of potential funders
- Rationale for fit
- Sample ask amount

3. Donor Segmentation Assistant

Purpose: Group donors into engagement tiers

Inputs: Donor data (manual or CSV)

Outputs:

- Tiered segments
- Custom messaging strategies
- Suggested CTAs

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4. Campaign Content Suite Generator

Purpose: Create multi-channel campaign content

Inputs: Campaign theme + audience

Outputs:

- Long and short emails
- Instagram and LinkedIn copy
- Text message sample
- Landing page headline
- Optional A/B testing ideas

5. Major Gift Strategy Canvas

Purpose: Plan donor cultivation journeys

Inputs: Prospect name + profile

Outputs:

- Cultivation timeline
- Three touchpoint suggestions
- Donor-specific case for support
- Gift size recommendation

6. Real-Time Grant Tracker

Purpose: Help staff manage grants in motion

Inputs: Grant list or deadlines

Outputs:

- Status tracker
- Owner assignments
- Suggested next steps
- Automated reminders

7. Board Engagement Assistant

Purpose: Equip board members for fundraising

Outputs:

- Editable report template

- Talking points for donor outreach
- Elevator pitch
- FAQ sheet for funders

8. AI Grant Readiness Checklist

Purpose: Assess whether an organization is ready to apply for grants

Outputs:

- Customized checklist (e.g., logic model, budget, EIN letter)
- Fill-in-the-blank sections and guidance

9. Partnership Pitch Creator

Purpose: Build value-aligned partnership proposals

Inputs: Target org or industry sector

Outputs:

- Outreach email
- Three custom value props
- Suggested messaging tone

ETHICAL + COMPLIANCE CONSIDERATIONS

Data Privacy

- Do not store or share sensitive information
- Always prompt user to anonymize donor or student data
- No fictitious stories or photos without explicit permission

Representation

- Avoid deficit framing (“at-risk,” “low-performing”)
- Highlight strength, persistence, and systemic barriers
- Promote dignity, inclusion, and community-rooted language

Accuracy + Trust

- Never fabricate funding sources or success metrics
- Be transparent about what’s inferred vs. confirmed
- Reinforce best practices in ethical storytelling



Encourage quarterly updates to:

- Refresh uploaded resources
- Adjust to shifting strategies or campaigns
- Improve tone, prompts, and workflow alignment



Prompt to include:

“What feedback have you received about this GPT? What should we refine for the next version?”

SAMPLE CONVERSATION STARTERS

These appear in the GPT’s welcome screen:

- *“Draft an update email for our top-tier donors after a milestone.”*
- *“Suggest 3 warm intros to reach this funder.”*
- *“Turn this board meeting note into a LinkedIn post.”*
- *“Create a two-page campaign brief for a direct service fund.”*
- *“Segment this spreadsheet into donor tiers with messaging.”*

REFERENCE MATERIALS (Uploaded in GPT Knowledge Tab)

- Fund descriptions (general operating, milestone fund, etc.)
- Planning templates (OKRs, campaign work plans)
- Sample donor communications
- CRM formatting guide
- Board elevator pitch + outreach FAQs
- A sample “How We Got This Gift” recap

About the Author



This guide was created by **Natalie Bergstrasser**, a social worker and fundraising advisor who helps mission-driven teams turn big ideas into fundable plans. Natalie works with organizations across sectors to build authentic funding strategies rooted in community impact, clarity, and alignment.

Have questions or want support applying this process to your own work? Reach out at **bergstrasserconsulting@gmail.com**.