

How to ChatGPT

A Real-Life Example

2/27/25

I'm the keynote speaker at an event where I will highlight the work I do with ChatGPT models. I've been asked to supply a document that contains a variety of items that I need support creating.

Of course! Let me know the specific items you need in the document, and I'll put everything together for you.

The first item is **a list of interview questions** that can be used to uncover how a generation wants to engage with the family business, how they want their kids to engage with the family business, and what their high-level life goals are.

Here's a list of interview questions tailored to uncover how a generation wants to engage with the family business, their vision for their children's involvement, and their high-level life goals:

Family Business Engagement

1. What role, if any, do you see yourself playing in the family business over the next 5–10 years?
2. How would you describe the ideal way for family members to engage with the business, regardless of their professional background?
3. What aspects of the family business are most meaningful to you personally?
4. Do you feel a strong sense of connection or obligation to the family business? Why or why not?
5. What opportunities would make engagement with the business more appealing to you?
6. What barriers, if any, prevent you from being more involved in the business?
7. How do you feel about family members holding leadership roles versus non-family executives?
8. Do you think the business should evolve to better reflect the values of your generation? If so, in what ways?

Next Generation Involvement

9. How do you hope your children (or future children) will engage with the family business?
10. What values or lessons do you want your children to learn from the family business?
11. Would you prefer your children to have a structured path into the business, or the freedom to explore their own careers independently?
12. What do you think is the best way to introduce younger generations to the family business without pressuring them?
13. Do you believe financial literacy or business education should be a priority for younger family members?

14. How should the family business support next-gen members who want to be entrepreneurs outside of the core business?

Personal Life Goals & Legacy

15. What are your top three personal or professional goals over the next decade?
 16. How do you define success for yourself outside of the family business?
 17. What kind of legacy do you want to leave, both within the family and in your broader community?
 18. What role does philanthropy, impact investing, or social responsibility play in your personal aspirations?
 19. How do you balance personal passions and family responsibilities?
 20. What resources, mentorship, or guidance would help you achieve your life goals?
- Would you like any refinements or additions to align better with your audience?

Slim this down to the top five questions I can use to guide a conversation.

Here are the **top five** questions to guide a conversation:

1. What role, if any, do you see yourself playing in the family business over the next 5–10 years?
2. How do you hope your children (or future children) will engage with the family business, if at all?
3. What aspects of the family business are most meaningful to you personally?
4. How do you define success for yourself outside of the family business?
5. What kind of legacy do you want to leave, both within the family and in your broader community?

These should open up meaningful discussions while keeping the conversation natural and engaging. Let me know if you'd like any tweaks!

Great. Now **write an email** to an owner inviting them to lunch. The purpose of lunch will be to further build and strengthen our relationship and for me to gain valuable insight into how they engage with the family business. I will use the questions developed above to guide our conversation. I want the tone of the email to be friendly, warm and inviting while still maintaining professional boundaries.

Subject: Lunch Invitation – Connecting & Conversation

Hi [Owner's Name],

I hope you're doing well! I'd love to take you to lunch sometime soon to catch up and hear more about your perspective on the family business. Building strong relationships across the ownership group is important to me, and I'd really value the opportunity to get to know you better.

Beyond just a good meal, I'd love to hear about how you see your role in the family business, what aspects of it are most meaningful to you, and how you think about the next generation's engagement. Your insights would be incredibly valuable as we continue shaping the future together.

Let me know if there's a day that works well for you—I'm happy to coordinate around your schedule. Looking forward to the conversation!

Best,
[Your Name]

Thanks. Let's get back to the resources I need to provide the group I'm presenting to.

Great—what's the next item you need support with for your keynote presentation?

Create an overview of **prompt engineering** that includes examples. This overview is for people who are new to ChatGPT and are just getting started.

Introduction to Prompt Engineering

What is Prompt Engineering?

Prompt engineering is the practice of crafting effective inputs (prompts) to guide ChatGPT or other AI models toward generating useful, relevant, and high-quality responses. The way a question or instruction is structured significantly impacts the quality of the AI's output.

Why Does Prompt Engineering Matter?

A well-structured prompt can:

- Provide clear and actionable responses
- Reduce ambiguity and improve accuracy
- Guide the AI's tone, format, and level of detail
- Enhance efficiency by reducing the need for follow-up clarifications

Basic Principles of Prompt Engineering

1. Be Clear and Specific

- Instead of: "Tell me about leadership."
- Try: "What are the top three qualities of an effective leader, with examples?"

2. Provide Context

- Instead of: "Write a summary of this book."
- Try: "Summarize the main themes of 'Atomic Habits' by James Clear in 3-4 sentences."

3. Define the Format You Want

- Instead of: "Explain machine learning."
- Try: "Explain machine learning in a simple, five-bullet-point list for beginners."

4. Set Constraints When Needed

- Instead of: "Give me business ideas."
- Try: "Give me three tech-related business ideas that require minimal startup costs."

5. Iterate and Refine

- If the response isn't quite right, tweak the wording, add details, or ask ChatGPT to refine its answer.

Examples of Effective Prompts

1. Structuring Responses for Clarity

💡 *Prompt: "Explain inflation to a 10-year-old in two sentences."*

✅ *Better Output: "Inflation is when prices go up over time, so the same amount of money buys less than before. It happens because things like supplies and wages change."*

2. Adjusting Tone and Style

💡 *Prompt: "Write a LinkedIn post about teamwork, making it inspiring but professional."*

✅ *Better Output: "Great teams don't just work together—they grow together. Success isn't about individual talent; it's about collective effort, trust, and shared goals. When we support each other, we achieve more than we ever could alone."*

3. Generating Lists

💡 *Prompt: "Give me five book recommendations for new managers, with a one-line summary for each."*

✅ *Better Output: (List of five books with descriptions, rather than a vague or overly detailed response.)*

4. Brainstorming Ideas

💡 *Prompt: "I need creative team-building activities for a remote team. Give me five options that are engaging and easy to implement."*

✅ *Better Output: (List of five specific activities, such as virtual escape rooms or collaborative challenges.)*

5. Step-by-Step Instructions

💡 *Prompt: "Explain how to write a business plan in five simple steps."*

✅ *Better Output: (Step-by-step breakdown of business plan creation.)*

Final Tips for New Users

- **Start simple and refine as needed.** The more detail you provide, the better the response.
- **Experiment with different styles.** If the response isn't quite right, tweak your wording or specify a tone.
- **Use follow-ups.** You can ask, "Can you simplify that?" or "Give me another example."

By using these techniques, you can get the most out of ChatGPT and make AI a valuable tool in your work and daily life.

Would you like any modifications or additional examples?

Adjust this for people who use ChatGPT regularly already, but can benefit from **higher level guidance**.

Advanced Prompt Engineering: Enhancing Your ChatGPT Experience

What is Advanced Prompt Engineering?

For regular ChatGPT users, advanced prompt engineering is about refining inputs to maximize efficiency, precision, and creativity. By structuring prompts more effectively, you can reduce iteration cycles, extract deeper insights, and tailor outputs to specific use cases with greater control.

Key Strategies for More Effective Prompts

1. Use Multi-Step Instructions

- Instead of: *“Summarize this report.”*
- Try: *“Summarize the key insights from this report in three bullet points. Then provide a two-sentence executive summary suitable for a board presentation.”*

2. Specify Perspective and Constraints

- Instead of: *“Give me negotiation tips.”*
- Try: *“Give me five negotiation strategies for a mid-level manager in the manufacturing industry, focusing on supplier agreements.”*

3. Leverage Iteration & Refinement

- Instead of: *“Rewrite this paragraph.”*
- Try: *“Rewrite this paragraph to be more persuasive, with a stronger call to action.”*
- Follow-up: *“Now make it more concise.”*

4. Optimize for Tone and Audience

- Instead of: *“Write a social media post about our company’s sustainability efforts.”*
- Try: *“Write a LinkedIn post about our company’s sustainability efforts, using an engaging but professional tone. Keep it under 150 words.”*

5. Combine Multiple Layers in One Prompt

- Instead of: *“Create a pros and cons list for remote work.”*
- Try: *“Create a balanced pros and cons list for remote work from the perspective of both employees and employers. Then, suggest three hybrid work models that mitigate the cons.”*

Examples of Advanced Prompts

1. Structuring Complex Outputs

💡 Prompt: *“Draft a one-minute speech for a CEO announcing a major company rebrand. Make it concise, confident, and forward-looking.”*

✅ Better Output: *(Clear, executive-style messaging instead of a generic announcement.)*

2. Generating Strategic Insights

💡 Prompt: *“Analyze the potential risks and opportunities of expanding our business into Latin America. Consider economic factors, competitive landscape, and regulatory concerns.”*

✅ Better Output: *(A structured breakdown with multiple dimensions of analysis.)*

3. Improving Creative Generation

💡 Prompt: *“Brainstorm five innovative ways to engage high-net-worth clients in a family office setting, with a focus on relationship-building and legacy planning.”*

✅ Better Output: *(More tailored, high-level ideas rather than generic engagement strategies.)*

4. Leveraging ChatGPT for Decision Support

💡 *Prompt: “Compare the leadership styles of Steve Jobs and Satya Nadella in terms of vision, communication, and company culture. Then, suggest which approach would be better for a startup focused on AI innovation.”*

✅ *Better Output: (A nuanced comparison followed by an application to a real-world scenario.)*

5. Iterative Refinement in Workflow

💡 *Prompt: “Draft a persuasive email inviting an executive to a private networking event. Keep it formal but engaging.”*

✅ *Follow-up: “Now make it sound more exclusive and add a subtle sense of urgency.”*

Final Tips for Power Users

- Break down large asks into structured steps to improve precision.
- Use follow-ups strategically to fine-tune tone, structure, or complexity.
- Combine prompts for multi-layered insights (e.g., generating ideas, then requesting an evaluation of the best one).
- Experiment with personas (“Respond as an industry expert with 20 years of experience in fintech”) to get domain-specific depth.
- Leverage ChatGPT for meta-improvement (“What’s a better way to phrase this question for deeper insights?”).

By applying these techniques, you can make ChatGPT a more effective tool for strategic thinking, communication, and execution.

Would you like any refinements or additional use cases?

What resources would you recommend for those looking to **incorporate ChatGPT** into their daily work?

For those looking to **incorporate ChatGPT into their daily work**, here are some valuable resources categorized by **learning level and use case**:

1. Learning & Skill Development

📖 Books & Guides

- *The Art of Prompt Engineering* by Nathan Hunter – A practical guide to writing better AI prompts.
- *The AI Advantage* by Thomas H. Davenport – Covers AI adoption in business strategy.
- *Superintelligence* by Nick Bostrom – A deeper dive into AI’s future impact.

🎓 Courses & Tutorials

- DeepLearning.AI – ChatGPT Prompt Engineering for Developers (*Free, Coursera*)
- OpenAI’s Official Documentation – <https://platform.openai.com/docs>
- Zapier’s AI Automation Training – Practical ways to automate workflows with ChatGPT.

2. Productivity & Automation Tools

✂ ChatGPT Extensions & Plugins

- ChatGPT for Google Chrome – Adds AI-powered search enhancements.
- AIPRM for ChatGPT – Prebuilt prompt templates for marketing, sales, and operations.
- Merlin AI – Enables ChatGPT access across emails, documents, and websites.

🔗 Automation & Integration

- Zapier – Automate tasks by connecting ChatGPT with apps like Gmail, Slack, and Trello.
- Notion AI – Embed AI-powered writing and research into Notion.
- Microsoft Copilot (formerly Bing AI) – Integrates ChatGPT into Word, Excel, and Teams.

3. Use Case-Specific Resources

📊 For Business & Strategy

- *AI-Powered Business: How to Use ChatGPT for Competitive Advantage* (E-Book)
- McKinsey's AI Reports – <https://www.mckinsey.com/featured-insights/artificial-intelligence>
- Harvard Business Review AI Insights – <https://hbr.org/topic/artificial-intelligence>

📝 For Writing & Content Creation

- Grammarly AI – Enhances AI-generated writing for clarity and professionalism.
- Lex.page – An AI-powered word processor for creative writing.
- Copy.ai & Jasper AI – AI-driven marketing and sales copywriting tools.

📊 For Data & Analytics

- Tableau GPT & Power BI Copilot – AI-driven business intelligence tools.
- ChatGPT Python API – Automate data analysis using OpenAI's API.
- Google Bard for Research – Alternative AI assistant for deeper web queries.

🗣️ For Meetings & Collaboration

- Otter.ai & Fireflies.ai – AI-powered meeting transcriptions with action item summaries.
- Semble AI – Meeting analysis and automatic note generation.
- ChatGPT Voice Mode (in ChatGPT Plus) – Interactive real-time conversations with AI.

4. Practical Ways to Use ChatGPT Daily

- ✅ **Email Drafting & Responses** – Use ChatGPT to refine, summarize, or personalize emails.
- ✅ **Meeting Summaries** – Transcribe and summarize key takeaways.
- ✅ **Brainstorming & Idea Generation** – Overcome creative blocks with AI-assisted brainstorming.
- ✅ **Process Documentation** – Quickly generate SOPs, policies, and training materials.
- ✅ **Decision-Making Support** – Ask ChatGPT to analyze pros and cons based on specific criteria.
- ✅ **Research & Market Analysis** – Extract insights from reports, trends, and competitive landscapes.
- ✅ **Workflow Automation** – Use AI in tools like Notion, Slack, or Google Docs to enhance productivity.

Final Thought

The best way to integrate ChatGPT into daily work is **through experimentation**. Start small, test different use cases, and refine your approach based on what saves the most time or enhances decision-making.

Would you like recommendations for a **specific industry** or **workflow setup**?

Privacy concerns are a hot topic with ChatGPT and other platforms. Share practical best practices to keep information safe.

Best Practices for Keeping Information Safe with AI

1. **Avoid Sharing Sensitive Data** – Never input personal, financial, or confidential business information into public platforms. Assume all inputs are not private.
2. **Use Secure AI Platforms** – Prefer enterprise-grade or self-hosted AI models for business use.
3. **Verify AI Outputs** – Always fact-check legal, medical, or financial responses before acting on them.
4. **Control Data Access** – Review permissions for AI integrations and restrict access where necessary.
5. **Use Anonymized Data** – Replace real names and details with placeholders when testing AI workflows.
6. **Check Privacy Policies** – Stay updated on how AI platforms store and use data, and opt out of data retention when possible.
7. **Educate Teams** – Train employees on AI risks, bias, and responsible usage.

Would you like a version tailored for a specific audience (e.g., executives, IT teams, general employees)?

What about **accuracy** concerns?

Best Practices for Ensuring AI Accuracy

1. **Fact-Check Critical Information** – AI can generate incorrect or misleading answers. Always verify important details, especially in legal, financial, or medical contexts.
2. **Cross-Reference with Trusted Sources** – Use AI as a starting point, not the final answer. Compare outputs with reliable industry sources or human experts.
3. **Be Aware of AI Hallucinations** – AI may confidently provide **false or fabricated** information. If something seems off, ask for citations or refine the prompt.
4. **Avoid Over-Reliance** – Use AI to assist thinking, not replace it. Judgment, experience, and context still matter.
5. **Clarify and Iterate** – If an answer seems vague or off-target, refine your prompt, ask for a different explanation, or request step-by-step reasoning.

Would you like guidance on accuracy in specific applications, such as **data analysis, research, or strategic decision-making**?