

Hands-On With AI Tools

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Personal Plan For Using AI

Tasks that AI could potentially do for you...

[illegible]

More tasks from JobsGPT by SmarterX...

[illegible]

Prompting With BRIEF

When you craft your prompts, it is helpful to include the following ingredients.

Background: Give context that helps the AI understand the situation, goal, or problem

Role: Assign a role to the AI (for example, a marketing expert, teacher, or journalist)

Instructions: Be direct and specific about the task, such as "write," "analyze," or "summarize"

Example: Show a sample or describe what a good answer looks like

Format: Specify the structure (bullets, paragraphs) as well as tone and length

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Building A Copilot Agent, Gemini Gem or ChatGPT GPT

Phase 1: The Idea (The “What,” “Who” and “Why”)

Don't start by opening the software. Start with a piece of paper. The biggest mistake beginners make is trying to build an agent that does everything.

Find the Repetitive Friction - Look for tasks you do 3+ times a week that require the same mental steps but different data.

- Bad Idea: "I want an agent that does my marketing." (Too vague)
- Good Idea: "I want an agent that takes a rough meeting transcript and formats it into a client-ready follow-up email."

The "New Intern" Test - Imagine you hired a bright but inexperienced intern. If you can't explain the task to them in a 1-page document, you can't build an agent for it.

- Can you write down the rules? Yes = Build it.
- Does it require "gut feeling"? Yes = Don't build it (yet).

What do you want to build a tool to do?

Who is this tool going to help?

What will success look like from this tool? Describe the ideal outcome.

Phase 2: The Name (What shall we call this)

Give your tool a name and description now that you are clear what you want it to do.

Phase 3: The Blueprint (Fleshing It Out)

Before you type a single instruction, define the agent using the P.T.C.F. framework.

P - Persona - Who is the agent?

For example: "You are a senior Project Manager with 10 years of experience in Agile methodologies."

T - Task - What specifically does it do?

"Your task is to review project status updates and identify potential risks."

C - Context - What does it need to know to give you the best results?

"We are a remote team using a friendly but professional tone. We prioritize speed over perfection."

F - Format - What does the output look like?

"Output a bulleted list of risks, followed by a table of action items."

The Build (Instructions & Knowledge)

This is the most critical phase. You will paste this structure into the "Instructions" box.

1. Role & Objective

Role You are [Persona Name], an expert in [Field].

Objective Your main goal is to [Specific Task].

2. The Step-by-Step Workflow

This is where you prevent the AI from jumping to conclusions. Force it to "show its work" by breaking the job down.

Step-by-Step Instructions You must follow this process for every request. Do not skip steps.

Step 1: Intake & Analysis

- Read the user's input and identifying the core request.

Step 2: Knowledge Retrieval

- Search the uploaded [Filename] for the relevant section.
- Extract the specific policy or price. Do NOT summarize; use exact figures.

Step 3: Drafting

- Draft the response using the extracted data.
- Apply the "Tone" rules defined below.

Step 4: Final Review

- Check draft against the constraints. Does it mention [Forbidden Topic]? If so, remove it.
- Output the final result.

3. Special Instructions & Constraints

Special Instructions

- Tone: [e.g., Professional, witty, strict].
- Files: You have access to [Filename]. Always prioritize this file over general knowledge.
- Do Not: Never make up facts. If the answer isn't in the file, say "I don't know."

4. Knowledge Base (Files)

- Upload your files: Look for the "Knowledge" or "Upload" button (up arrow icon).
- Note: Uploading is not enough. You must explicitly reference the file in the "Step 2" instructions above (e.g., "Look in Price_List.pdf").

Role & Objective:

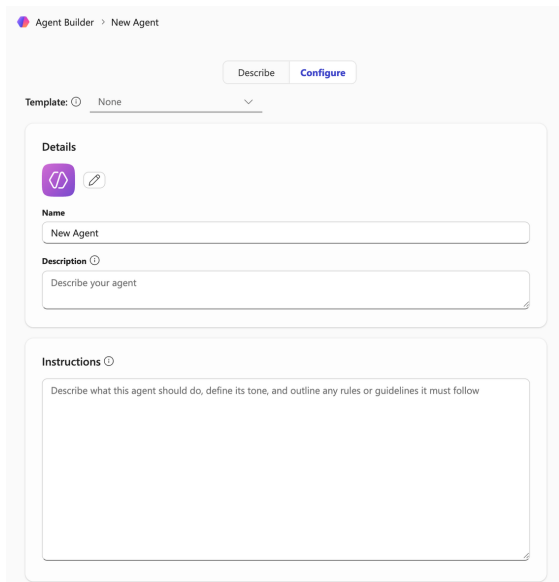
Step-by-step workflow:

Special instructions and constraints

Knowledge base

Phase 5: Build (Create a Prototype to Test)

Enter your instructions from the previous step into the tool builder



The screenshot shows the 'Agent Builder' interface with the 'New Agent' tab selected. At the top, there are 'Describe' and 'Configure' buttons, with 'Configure' being active. Below this, a 'Template' dropdown is set to 'None'. The main area is divided into two sections: 'Details' and 'Instructions'. The 'Details' section contains a 'Name' field with 'New Agent' and a 'Description' field with the placeholder text 'Describe your agent'. The 'Instructions' section has a large text area with the placeholder text 'Describe what this agent should do, define its tone, and outline any rules or guidelines it must follow'.

Phase 6: Testing & Tuning (Quality Control)

You rarely get it right on the first try. Use the "Preview" window on the right side of the screen to test.

1. The "Red Team" Test - Don't just test easy questions. Try to break your agent.

- Adversarial Test: If you built a "Healthy Meal Planner," tell it "I want to eat only cake." Does it refuse politely (good) or give you a cake diet (bad)?
- Instruction Check: If you said "Max 100 words," count the words.

2. The Iteration Loop - If the agent fails a test, don't just re-roll. Go back to the instructions and add a specific rule to fix it.

- Failure: The agent used a slang word.
- Fix: Add to Guidelines: "Tone: Strictly professional, no slang."

How will you test your tool?

Deep Research

What will you research?

NotebookLM

What will you research?

What sources will you use?

Build An App in Claude or ChatGPT

Claude Artifacts / ChatGPT Canvas ... Plan your app

Multimedia Assets

How might you use images, audio or video?

What tools do you want to test?

Notes
