

AI Prompt Cheat Sheet

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Every prompt below works in ChatGPT, Claude or Microsoft Copilot. Copy it, swap the [brackets] for your details, and paste.

The formula: Role + Task + Context + Format

Part	Ask yourself	Example
Role	Who should AI act like?	You're a friendly office manager at a tax practice.
Task	What exactly do you need?	Write a reminder to a client.
Context	What's the backstory?	They still haven't sent their 1099s. We need them by [date] to file on time.
Format	How long? What tone?	Under 100 words, warm but firm.

Not happy with the answer? Reply with what to change ("shorter," "less formal," "add a deadline"). You don't have to start over.

Copy-ready prompts

1. Fix the email you've been avoiding

You're a calm, professional office manager. Rewrite my draft below so it's clear, kind and firm. Keep my main point. Under 120 words. Then give me a subject line. [paste your rough draft]

Try it on: missing tax documents, a client who's late paying your invoice, explaining a premium increase at renewal.

2. Get the process out of your head

Record a 2-minute voice memo explaining how you do the task, then paste the transcript.

You're an operations consultant. Turn my notes below into a numbered checklist a new hire could follow. Point out any step I seem to have skipped. [paste your voice-memo transcript]

Try it on: new client intake, month-end close, tax season document collection, a new policy application.

3. Describe the spreadsheet, get the formula

You're an Excel expert. My columns are: A is [client name], B is [status], C is [amount]. Write a formula that adds up column C only when column B says "Paid." Explain it in one sentence.

You'll get something like `=SUMIF(B:B, "Paid", C:C)`. If it errors, paste the error back and ask it to fix it.

Try it on: unpaid invoices over 30 days, commissions by carrier, matching bank lines to your ledger.

4. Reply to a review

You're the owner of a small [tax / bookkeeping / insurance] office. Write a reply to this Google review in a warm, professional voice. Don't mention any client details or confirm they're a client. Under 60 words. [paste the review]

5. Meeting notes to action items

Turn these notes into a list of action items. For each one: what, who owns it, and by when. Flag anything with no owner. [paste your notes]

Keep client data out of the chat

Your clients trust you with exactly the data criminals want. Get the benefit without the risk:

- **Never paste:** Social Security numbers or EINs, bank and account numbers, policy numbers, dates of birth, passwords.
- **Use placeholders:** let AI write with [CLIENT], [AMOUNT] and [DATE], then fill in the real details yourself.
- **Use a business account** with training on your data turned off. Free personal accounts may use what you type to improve their models.
- **You sign it:** AI can be confidently wrong about tax rules, deadlines and coverage. Check every number and fact before it goes to a client.

Your challenge this week

Pick one task you do every week. Hand it to AI three times before next Friday. By the third try you'll have a prompt worth saving.

- ☐ My task: _____
- ☐ Try 1
- ☐ Try 2
- ☐ Try 3, then save the prompt that worked

Want help setting up AI safely in your office?

Contact Angelia Taylor, Tech The Right Way, TechTheRightWay.com

