**PROMPTING TEMPLATES**

**1. How to Use AI for Routine Admin Tasks**

* **Manage daily to-do lists**
  + **Prompt 1:**  
    Act as my assistant. I have multiple tasks today but need help prioritizing them effectively. Ask me questions you need answered to clearly prioritize and schedule these tasks.
  + **Prompt 2:**  
    Based on my answers, organize these tasks clearly for today. Include:  
    - Priority level (high, medium, low)  
    - Recommended order  
    - Estimated completion time  
    - Tasks I can delegate or postpone clearly noted
* **Prioritize workday**
  + **Prompt 1:**  
    Act as my executive assistant. I need help structuring my workday. I will share my list of tasks — please ask me any follow-up questions you need to build a prioritized daily schedule.
  + **Prompt 2:**  
    Based on this info, build a prioritized daily schedule for me. Include start times, group similar tasks, and align work to energy levels and meeting times.
* **Write & polish emails**
  + **Prompt 1:**  
    Act as my professional assistant. Draft a concise, polite email to a client named Sarah, updating her that the project is on track and will be completed by Friday as planned.
  + **Prompt 2:**  
    Make the tone warmer and slightly more enthusiastic, while keeping it professional.
* **Summarize meetings or notes**
  + **Prompt 1:**  
    Act as my admin assistant. Summarize the following meeting notes into 5 bullet points. Focus on decisions made and next steps. Use clear, concise language.
  + **Prompt 2:**  
    Summarize this again in just 3 bullets, combining related points where possible.
* **Draft internal memos**
  + **Prompt 1:**  
    Act as a communications officer. Draft a short internal memo informing all staff that our new hybrid work policy begins next month. The tone should be professional, clear, and under 150 words.
  + **Prompt 2:**  
    Make this memo more upbeat and conversational, while still being professional.
* **Generate follow-up emails**
  + **Prompt 1:**  
    Act as my executive assistant. Draft a brief, professional follow-up email to Alex regarding our meeting last Thursday. Ask for feedback on the proposal and suggest scheduling a follow-up call this week.
  + **Prompt 2:**  
    Make the tone more casual and friendly, suitable for a peer or familiar colleague.
* **Format and refine documents**
  + **Prompt 1:**  
    Act as my editing assistant. Take the following rough draft and rewrite it clearly, professionally, and concisely. Improve structure and formatting.  
      
    Draft:  
    “We’ve been trying to finish the budget thing for the last few days but it's not done yet. Some numbers were missing and we’ll probably need to get more info from James or Finance before it’s ready.”
  + **Prompt 2:**  
    Reformat this message into 3 short bullet points for a quick internal update.
* **Automate calendar replies**
  + **Prompt 1:**  
    Act as my assistant. Write a polite automatic reply template for meeting invites received between 1pm and 5pm on Fridays. Let them know I’m unavailable during this window and suggest rescheduling for Monday or Wednesday morning.
  + **Prompt 2:**  
    Make this message more formal and suitable for external business contacts.

**2. How to Use AI for Project Management**

* **Draft project briefs**
  + **Prompt 1:**  
    Act as a project manager. I need help drafting a project brief. Please ask me the key questions you need to write a clear, structured one-pager.
  + **Prompt 2:**  
    Thanks. Now write a one-page project brief using those answers. Use a professional format.
* **Create timelines and task breakdowns**
  + **Prompt 1:**  
    Act as a project planner. I need to build a 6-week timeline for launching an employee recognition platform. Ask me any questions you need to structure it properly.
  + **Prompt 2:**  
    Thanks. Now create a 6-week timeline with task breakdowns per phase, assigned teams, and suggested due dates. Include milestones.
* **Track progress summaries**
  + **Prompt 1:**  
    Act as a project coordinator. I need to summarize project progress based on team input. Ask me what details you need to create a simple, clear summary.
  + **Prompt 2:**  
    Thanks. Now create a short, professional project update summary based on this input.
* **Draft stakeholder updates**
  + **Prompt 1:**  
    Act as my executive communications assistant. I want to write a stakeholder update based on a project summary. Please ask what details you need to draft it professionally.
  + **Prompt 2:**  
    Thanks. Please draft a stakeholder update email based on this. Keep it under 150 words and use a professional tone.
* **Risk identification & mitigation prompts**
  + **Prompt 1:**  
    Act as a project risk consultant. I’m managing a 6-week rollout of an internal employee recognition platform. Please ask me the questions you need to identify and mitigate potential risks.
  + **Prompt 2:**  
    Thanks. Based on that info, list 3–4 potential risks and mitigation strategies for each.
* **Meeting agenda generation**
  + **Prompt 1:**  
    Act as a project coordinator. I need a 30-minute project meeting agenda. Please ask me what kind of project it is and what stage we’re in, so you can structure it properly.
  + **Prompt 2:**  
    Thanks. Please generate a structured agenda for a 30-minute check-in meeting. Include time estimates per section.
* **Status report templates**
  + **Prompt 1:**  
    Act as a project analyst. I want to create a reusable weekly status report template for internal updates. Ask me what kind of sections to include.
  + **Prompt 2:**  
    Great. Please generate the status report template using those sections. Format it as a fillable outline.

**3. How to Use AI for Finance**

* **Draft budget summaries**
  + **Prompt 1:**  
    Act as a financial analyst. I need a short summary of a department budget. First, ask me what info you need to generate a clear and useful summary.
  + **Prompt 2:**  
    Thanks. Now write a short, clear summary I can paste into a report or slide deck. Use bullet points.
* **Interpret basic financial statements**
  + **Prompt 1:**  
    Act as a financial analyst. I have an income statement and want a simple business summary. Please ask me for the details you need to do this properly.
  + **Prompt 2:**  
    Thanks. Please write a short summary of this income statement. Keep it business-friendly — suitable for a general team or stakeholder update.
* **Expense categorization**
  + **Prompt 1:**  
    Act as a finance assistant. I have a list of expenses and I need them categorized into types like Travel, Meals, Software, etc. Please ask what format I’ll be giving you and what output I need.
  + **Prompt 2:**  
    Output the categorization as a clean table and also as plain text. Detect the categories based on description.
  + **Prompt (optional) 3:**  
    Please output this in CSV format: Description, Amount, Category

* **Invoice or payment reminders**
  + **Prompt 1:**  
    Act as a finance assistant. I need to send a polite reminder email for an overdue invoice. Please ask me for the key details you need first.
  + **Prompt 2:**  
    Thanks. Please write a short, polite reminder email with a professional tone. Include a call to action and note that no prior reminder has been sent.
  + **Prompt 3:**  
    Now rewrite that in a slightly firmer tone, as a second follow-up if the client hasn’t responded in 10 days.
* **Forecasting support**
  + **Prompt 1:**  
    Act as a business analyst. I want to create a rough revenue forecast for the next 3 months. Ask me the inputs you need and include best-case and worst-case projections.
  + **Prompt 2:**  
    Thanks. Create a 3-month revenue forecast (May–July) with best-case and worst-case projections. Include notes for each month explaining why.
  + **Prompt (optional) 3:**  
    Please format the forecast as a simple table comparing months and ranges.

* **Financial Q&A support (e.g., “Explain EBITDA”)**
  + **Prompt 1:**  
    Explain “EBITDA” like I’m a business manager who doesn’t have a finance background. Keep it simple and use a real-world example.
  + **Prompt 2:**  
    Rewrite the explanation of EBITDA as a one-line definition and include an optional table for a finance 101 slide.
  + **Prompt 3:**  
    Explain EBITDA in 2 sentences for someone in marketing. Keep it non-technical but accurate.

**4. How to Use AI for Marketing**

* **Write social media captions**
  + **Prompt:**  
    Act as a social media content strategist. I need three caption options for a LinkedIn post about our new AI-powered analytics feature. Ask me what you need to tailor tone, format, and audience.
  + **Prompt:**  
    Thanks. Now generate 3 caption options in carousel-style format. Include a CTA to request a demo, and add 1–2 hashtags relevant to analytics or AI.
* **Brainstorm campaign ideas**
  + **Prompt:**  
    Act as a creative marketing strategist. I need ideas for a Q3 awareness campaign. Ask me for brand info, audience, budget level, and goals before suggesting ideas.
  + **Prompt:**  
    Thanks. Suggest 5 campaign ideas with creative angles and possible taglines. Include one webinar concept and one email series.
* **Create ad copy drafts**
  + **Prompt:**  
    Act as a paid media copywriter. I need Facebook and Google ad copy for promoting an AI onboarding tool. Ask me for key product info, audience, offer, and tone.
  + **Prompt:**  
    Thanks. Write 2 Facebook ad versions and 2 Google ad versions with short headlines, body copy, and a CTA. Include one playful and one straightforward version for each.
* **Generate SEO blog outlines**
  + **Prompt:**  
    Act as an SEO content strategist. I need a blog outline optimized for search traffic. Ask me for the topic, target audience, and keywords before writing it.
  + **Prompt:**  
    Thanks. Create a blog outline with clear section headers (H2), a short intro, and SEO-optimized subtopics. Keep tone informative and expert-friendly.
* **Repurpose content for different channels**
  + **Prompt:**  
    Act as a content repurposing expert. I have a blog post and I want to convert it into a LinkedIn post, a short email for clients, and a social caption. Ask me for the original content and tone for each platform.
  + **Prompt:**  
    Thanks. Rewrite this blog content for each format with the tones provided. Include CTAs and adjust length accordingly.
* **Draft newsletter content**
  + **Prompt:**  
    Act as a B2B email copywriter. I want to draft a 3-section monthly newsletter for our company audience. Ask me what we want to include, tone, and any CTAs.
  + **Prompt:**  
    Thanks. Write a 3-section newsletter with an engaging subject line, intro paragraph, section headings, and a CTA per section.

**5. How to Use AI for Communication**

* **Internal announcements**
  + **Prompt 1:**  
    Act as an internal comms specialist. I need help writing a short, clear team-wide announcement. Ask me for the topic, tone, and key points before writing it.
  + **Prompt 2:**  
    Thanks. Please write a short email announcement to all staff. Make it clear, friendly, and structured with a heading and bullet points where needed.
* **Client email responses**
  + **Prompt 1:**  
    Act as a client-facing communications specialist. I’ll paste a client email, and you’ll help me write a polished reply. Ask me what tone to use, and if I need to include anything specific like attachments, links, or timelines.
  + **Prompt 2:**  
    Thanks. Now write a client email response that confirms report delivery by Friday, acknowledges their dashboard questions, and notes we’ll respond fully by Monday. Keep tone professional and reassuring. **Tone:** Professional and reassuring  
    Include: Confirm Friday delivery, mention team is reviewing dashboard feedback and will reply Monday.
* **Presentation outlines**
  + **Prompt 1:**  
    Act as a business presentation consultant. I need a slide-by-slide outline for a 10-minute team update presentation. Ask me what I want to cover and who the audience is.
  + **Prompt 2:**  
    Thanks. Write a 6–7 slide outline for this team update presentation. Include headings and bullet points for each slide. Keep it concise.
* **Clarifying complex concepts**
  + **Prompt 1:**  
    Explain what an API integration is to a marketing manager with no technical background. Use a workplace analogy and keep it to 2 paragraphs.
  + **Prompt 2:**  
    Now explain the same thing to a new software developer in onboarding.
* **Creating short messages for Teams/Slack/LinkedIn**
  + **Prompt 1:**  
    I need a message for Teams to remind the team our Monday stand-up starts at 10am sharp. Friendly but firm tone.
  + **Prompt 2:**  
    Write a short LinkedIn DM following up after meeting at a conference. Tone: friendly, casual-professional.
* **Tone adjustment (make it more formal/casual)**
  + **Prompt 1:**  
    Please rewrite this message in a more [formal / casual / empathetic / assertive] tone. Keep the meaning, just adjust the delivery. **Original Message:**  
    “Hey, just a heads up — the tool might be down for a bit after 2pm while we run the update.”
  + **Prompt 2:**  
    Now rewrite it in a more casual tone for a team Slack.
  + **Prompt 3:**  
    Original: “Can you please share the document?”  
    Rewrite in more assertive tone.

**6. How to Use AI for Data Analysis**

* **Summarize CSV/Excel data**
  + **Prompt 1:**  
    Here’s a dataset of monthly sales by region. Please summarize the top findings. Highlight best and worst performers, and any outliers.  
    *(Upload CSV or paste sample)*
  + **Prompt 2:**  
    Summarize the trends in this table. Point out top and lowest performers overall, and any month-to-month patterns.
* **Identify trends**
  + **Prompt 1:**  
    I’ll paste in monthly website traffic data by source. Please identify any trends — like increases, drops, or consistent changes over time.
  + **Prompt 2:**  
    What are the key trends in this dataset? Focus on which traffic sources are growing, declining, or consistent.
* **Create quick charts**
  + **Prompt 1:**  
    I’ve got sales data by region. Can you create a simple bar chart comparing each region’s Q1 totals? Here’s the data:  
    North: 65K, South: 48K, East: 88K, West: 45K
  + **Optional Prompt:**  
    Now make it a pie chart. Use blue for North, green for East, and label the slices with values.
* **Generate insights from raw data**
  + **Prompt 1:**  
    I’ll paste in recent customer survey data. Please analyze it and suggest 3 key insights, including what actions we might take.
  + **Prompt 2:**  
    What insights can we draw from this? Group related issues, and suggest how to improve future onboarding.
* **Suggest actions based on KPIs**
  + **Prompt 1:**  
    Here are last month’s KPIs. Can you suggest 2–3 action steps based on performance trends?
  + **Prompt 2:**  
    Please identify which metrics need the most attention and what we could do to improve them.
* **Generate formulas**
  + **Prompt 1:**  
    Write a Google Sheets formula to calculate the total monthly spend by category, using a table where Column A is Date, Column B is Category, and Column C is Amount.
  + **Prompt 2:**  
    Now write a formula to flag rows where the amount is over $10,000 and the category is 'Legal'.
  + **Prompt 3:**  
    Here’s the formula I used and the error I’m getting — can you fix it?  
    *(Paste formula and error)*

**7. How to Use AI for Coding & Development**

* **Write and explain simple code snippets**
  + **Prompt 1:**  
    Write a short Python function to calculate the discount price of a product. Also explain how it works, line by line, in plain English.
  + **Prompt 2:**  
    Write a JavaScript snippet that validates an email address.
* **Debug common errors**
  + **Prompt 1:**  
    Here’s a Python function that’s not working. Can you help debug it? Also explain what was wrong and what you fixed.  
    python\ndef get\_total\_price(price, tax):\n return price + price \* tax\_percent\n
  + **Prompt (optional):**  
    Here’s a block of JavaScript with a bug — it doesn’t return the correct output. Can you fix and explain it?  
    *(Paste code)*
* **Generate pseudocode**
* **Prompt 1:**  
  Create pseudocode for a login system that checks if the username and password match a database entry. If correct, log in the user; if not, show an error.
* **Optional Prompt:**  
  Now convert that into a flowchart description or bulleted workflow if needed for a proposal.
* **Document code automatically**
  + **Prompt 1:**  
    Please add comments and a docstring to this Python function to explain how it works.  
    python\ndef calculate\_bonus(sales, target):\n if sales > target:\n return (sales - target) \* 0.1\n else:\n return 0\n
  + **Prompt 2:**  
    Now add a docstring for professional documentation style.
* **Create test cases**
  + **Prompt 1:**  
    Write 3 unit test cases for this Python function using pytest. Include normal, edge, and failure cases.  
    python\ndef apply\_discount(price, percent):\n return price - (price \* percent / 100)\n
  + **Prompt 2:**  
    Add a test to handle negative prices or invalid percentages.
* **Translate code between languages**
  + **Prompt 1:**  
    Translate this Python function into JavaScript. Explain what changes in the logic, if any.  
    python\ndef is\_even(n):\n return n % 2 == 0\n
  + **Prompt 2:**  
    Now translate to C# and add inline comments explaining syntax changes.
  + **Prompt 3:**  
    Convert this SQL query into Pandas code:  
    SELECT name FROM employees WHERE department = 'HR'