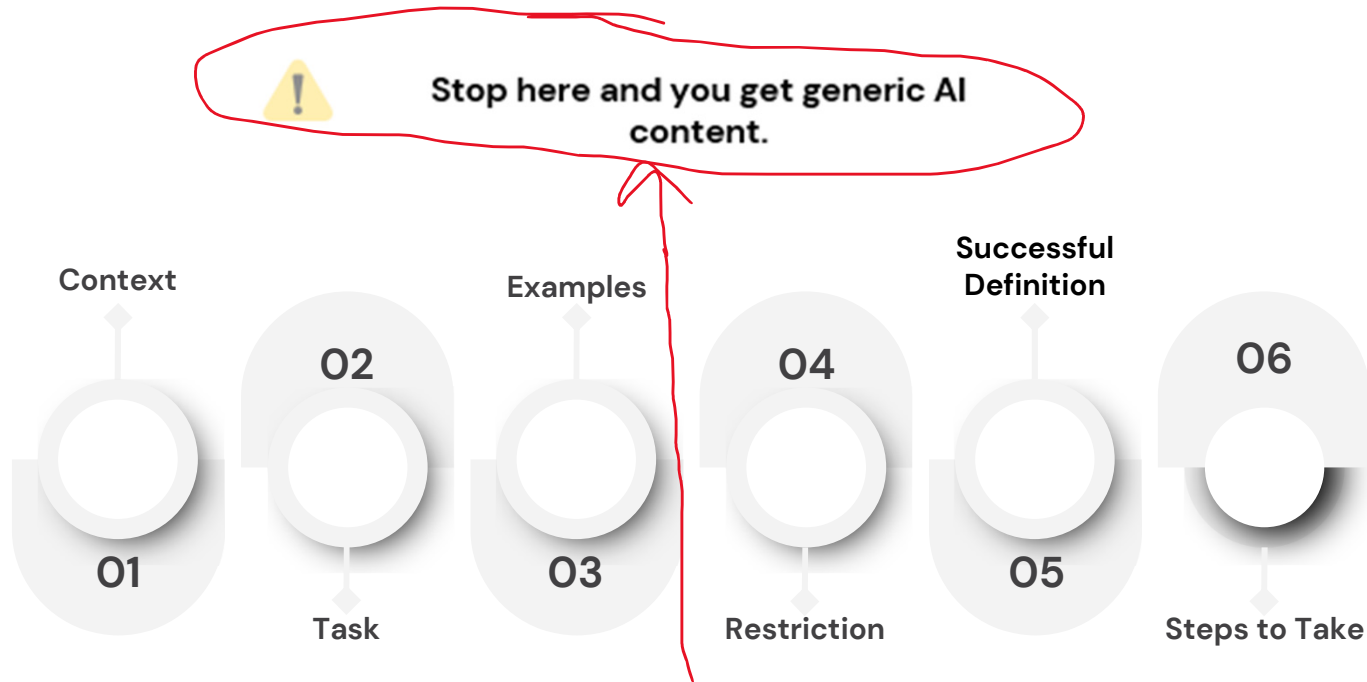


PILLAR 1: AI ASSIST & THE SIX FUNDAMENTALS OF PROMPTING





1. CONTEXT

"Treat the AI like an infinitely patient, enthusiastic new co-worker, who forgets everything you say with each new conversation"

— Ethan Mollick

Context Template // Prompt

Act as a [role] who works for
[company], is [tone of voice] and
[primary objective].





2. TASK

Use prefixes such as **explain, describe, create, write, update, translate, summarize, role-play, advise, teach, ask, research, reason, etc.**

Task Template // Prompt

[Act as a copywriter who...]

Write a high-converting landing page outline for my new AI agent offering for for accounting firms.

Here are the details: **[copy-paste]**





3. EXAMPLE

Examples teach AI your voice, structure, formatting, and level of detail far faster than explanation alone. Even one solid example dramatically increases quality because it gives the model something concrete to imitate, instead of guessing what you meant.

Example Template // Prompt

[Act as a...] [Write a...]

Here are 5 of my top-performing marketing emails:

[copy-paste]. Mimic these in structure, style, tone of voice and word choice.





4. RESTRICTIONS

Restrictions tell the AI what not to do, just as important as the task itself. They control tone, length, formatting, complexity level, or things to avoid (e.g., jargon, fluff, assumptions). The clearer your boundaries, the less the AI wanders — and the more useful and on-brand the answer becomes.

Restrictions Template // Prompt

[...] The tweets you write must be **less than 280***
characters.

The blog post has to be **500+ words.**

Respond with **one word only.**





5. SUCCESS DEFINITION

Without a success definition, the model will default to generic “helpful” responses — which often means too broad, too long, or too vague. When you specify what a winning output includes (and what it must accomplish), you turn AI into a precision tool instead of a content slot machine.

Success Definition Template // Prompt

[...] A good cold outreach email is **highly-personal** to the prospect, **demonstrates a good understanding** of their business, their current challenges and **offers them something of value** to discuss on a quick call.





6. STEPS TO TAKE

Describe the task you want the LLM to do.

- Use prefixes such as **explain, describe, create, write, update, translate, summarize, role-play, advise, teach, ask, research, reason, etc.**

Steps to Take Template // Prompt

To do this, you should first: Analyze all **<context>** and **<messages>** to understand the context of the ticket. Then, check the tool call against the **<policy>** and the checklist in **<checklist>**. If the tool call passes the **<checklist>** and Customer Service policy in **<context>**, return “accept”, if it does not pass, return “reject” with **<comment>**. You should ALWAYS make sure that the tool call helps the user with their request and follows the **<policy>**.

