

THE BARATELLI INSTITUTE · FOUNDATIONS

The AI Prompt Library

91 ready-to-use prompts — and how to use them

Copy a prompt, swap the bracketed parts for your situation, and go. Start with prompts for everyone, then by professional discipline or industry. In plain English, no jargon.

FREE FROM THE BARATELLI INSTITUTE

Philip A. Baratelli, CPA, MBA · baratelliinstitute.com · current as of June 2026

Four things, and you're off.

Every prompt in this library is a starting point you make your own. The skill is small:

1. **Pick the prompt** closest to your task — from **For everyone**, or from your professional discipline or industry.
2. **Replace the [brackets]** with your real specifics — names, numbers, context.
3. **Paste it** into Claude, ChatGPT, or whatever you use. If the first answer isn't right, just tell it what to fix.
4. **Check what matters** — any fact, figure, citation, or date before it leaves your hands.

Two rules that keep you safe. Many prompts end by asking the AI to flag what you should verify — that's deliberate; do the verifying. And don't paste private client details (names tied to financials, SSNs, whole returns, patient information) into a public tool — strip the identifying bits first, or use a business-tier account with a data agreement. Where a prompt carries extra risk, you'll see a **Before you use this** note right on the prompt.

Prefer to click instead of copy from a page? The same library is a free interactive tool at baratelliinstitute.com/tools — pick a category, pick a prompt, copy.

START HERE

Five prompts to try first

New to this? Start with these five. They aren't separate sections — each one is a single prompt that also appears in full in its category later in the guide. The page number tells you where to find it. The first two are **building blocks** you save once and reuse with everything else; the other three are everyday workhorses.

PAGE

5

1. Verification Prompt in For everyone · All Professional Service Disciplines

Use this before you trust any AI answer on a tax, legal, or financial question.

PAGE

5

2. Meeting Notes → Action Items in For everyone · All Professional Service Disciplines

Use this to turn raw meeting notes into clear owners and next steps.

PAGE

5

3. Self-Critique / Red-Team in For everyone · All Professional Service Disciplines

Use this to make any AI answer better — have it attack its own work.

PAGE

8

4. Business Context Block in For everyone · All Businesses

Use this once, save it, and paste it atop any business prompt.

PAGE

8

5. Email from Bullet Points in For everyone · All Businesses

Use this to turn a few bullets into a polished email.

These five are also starred in the free interactive tool at baratelliinstitute.com/tools.

CONTENTS

What's inside

FOR EVERYONE

All Professional Service Disciplines (10)	5
All Businesses (18)	8

PROFESSIONAL SERVICE DISCIPLINES

Accounting (8)	13
Law (6)	16
Wealth Management (5)	18
Family Office (5)	20

OTHER INDUSTRIES

Retail (6)	22
Restaurant (7)	24
Medical / Dental (4)	26
Real Estate (5)	28
Construction / Trades (4)	30
Salons / Spas (4)	32
Logistics / Delivery (3)	34
E-Commerce (6)	35

All Professional Service Disciplines

AI READINESS SELF-ASSESSMENT

Use this when you want an honest read on how ready your firm is to use AI.

You are a senior advisor in a **[CPA / law / RIA / family office]** firm. I want to assess my firm's AI readiness. Ask me 10 targeted questions about our current AI tool use, data security practices, prompt quality, verification protocols, and staff training. After my answers, give me a score out of 100 and a prioritized list of 5 improvements.

VERIFICATION PROMPT

Use this before you trust any AI answer on a tax, legal, or financial question.

I am going to give you a complex **[tax / legal / financial]** question. Before you answer: (1) Tell me which parts of your answer rely on established law or guidance vs. your own synthesis. (2) Flag any specific statutory references, dollar amounts, case names, or dates that I must independently verify. (3) Tell me where reasonable professionals might disagree with your analysis. Then give me your full answer.

TOOL EVALUATION

Use this when you're choosing which AI tool to adopt for your practice.

I am a **[CPA / attorney / RIA / family office director]** evaluating AI tools for my practice. My top 3 use cases are: **[list]**. My current software stack is: **[list]**. My data sensitivity level is: **[consumer/business/enterprise tier needed]**. Evaluate the following tools for my specific situation and recommend which to try first, with your reasoning: **[list tools]**.

PROMPT LIBRARY BUILDER

Use this to turn your most repetitive tasks into reusable prompts.

I want to build a prompt library for my **[CPA / law / RIA / family office]** firm. My top 5 most time-consuming tasks are: **[list]**. For each task, write a complete structured prompt using role, task, context, and constraints. Include a verification reminder at the end of each prompt.

STAFF TRAINING BRIEF

Use this when you need to bring your team up to speed on AI.

I need to brief my staff on how we will use AI tools in our practice. Write a 10-minute presentation outline covering: (1) what AI can and cannot do for our practice, (2) our approved tools and data rules, (3) the verification protocol they must follow, (4) what happens if AI produces problematic output. Tone: practical, not alarmist.

COLD OUTREACH EMAIL SEQUENCE

Use this to draft a multi-touch prospecting sequence.

You are a business development specialist for a **[CPA / law / RIA / family office]** firm. I want to build a 3-email cold outreach sequence targeting **[target audience: e.g., "privately held businesses with \$10M-\$50M in revenue in our metro area"]**. Our value proposition: **[describe]**. Write: Email 1 (brief, curiosity-focused, no pitch), Email 2 (one specific value example, soft ask), Email 3 (final follow-up, easy out). Each under 120 words. Include subject line options for each.

90-DAY AI PLAN

Use this when you want a concrete rollout plan, not just ideas.

I am the managing partner of a **[type]** firm with **[number]** professionals. We currently use: **[list current AI tools]**. Our top 3 AI priorities for the next 90 days are: **[list]**. Our AI lead is **[name/role]**. Build a detailed 90-day implementation plan with: specific actions by week, owner for each action, success metric for each action, and the single most important thing to accomplish in each 30-day phase.

MEETING NOTES → ACTION ITEMS

Use this to turn raw meeting notes into clear owners and next steps.

You are an executive assistant. Here are my raw notes from a **[meeting type]: [paste notes]**. Produce: (1) a 3-sentence summary of what was decided, (2) a table of action items with owner and due date (use **[TBD]** where unstated), (3) any open questions that still need an answer, (4) a short, friendly recap email I can send to attendees. Keep it concise and do not invent decisions that aren't in my notes.

SELF-CRITIQUE / RED-TEAM

Use this to make any AI answer better — have it attack its own work.

Here is an answer you just gave me: **[paste the answer, or say 'your previous answer']**. Now critique it as a tough, knowledgeable skeptic. List: (1) the three weakest points or assumptions, (2) anything that may be inaccurate or needs verification, (3) what an expert would push back on, (4) what's missing. Then give me an improved version that fixes those weaknesses.

EMAIL FROM BULLET POINTS

Use this to turn a few bullets into a clean, professional email.

Turn these bullet points into a clear, professional email. Bullets: **[paste bullets]**. Recipient: **[who they are]**. Goal of the email: **[what I want to happen]**. Tone: **[warm / formal / direct]**. Keep it under **[X]** words, lead with the point, and end with a specific next step. Give me a subject line too.

All Businesses

FIND YOUR AI OPPORTUNITIES

Use this to find where AI will save you the most time.

I own a **[type of business]** with **[number]** employees. We use **[list main software]**. My biggest time wasters each week are **[list 3]**. Generate a prioritized list of AI applications for my top 3 time wasters: what tool to use, what it costs, what data I need, hours saved per week, and any compliance considerations.

BUSINESS CONTEXT BLOCK

Use this once, save it, and paste it atop any business prompt.

My business: **[Business name]** is a **[type]** in **[city, state]**. We have been in business **[X]** years with **[X]** employees. Our typical customer is **[describe]**. Our brand voice is **[describe]**. Our top 3 competitors are **[names]**. Our differentiator is **[what makes you different]**. Our busiest season is **[when]**. Our biggest operational challenge is **[what]**.

AI DATA USE POLICY

Use this to set simple rules for what staff can put into AI.

I own a **[type of business]** in **[state]**. I use these AI tools: **[list]**. Draft a simple AI data use policy covering: (1) what data employees may/may not share with AI, (2) approval process for new AI tools, (3) review process before AI output reaches customers, (4) access management when staff leave. Plain language, under 500 words.

TOOL STACK AUDIT

Use this to find AI you already pay for and gaps worth filling.

I pay for these software subscriptions: **[list all tools with monthly costs]**. I want AI help with **[top 3 use cases]**. Audit my stack: (1) AI capabilities I already pay for but don't use, (2) gaps to fill with new tools, (3) subscriptions to cancel/downgrade, (4) single highest-ROI addition I could make. Prioritize by ROI.

NEGATIVE REVIEW RESPONSE

Use this when a bad review needs a calm, professional reply.

You are a customer service specialist. I received this **[Google/Yelp]** review for my **[business type]: [paste review]**. Write 3 responses: (1) Apologetic with specific resolution. (2) Professional without over-apologizing. (3) Brief and de-escalating. Each under 90 words, acknowledges the specific complaint, invites direct contact, never defensive.

POST-SERVICE FOLLOW-UP EMAIL

Use this to thank a customer and ask for a review.

Write a follow-up email for **[business name]**, a **[type]** in **[city]**. Customer **[FIRST NAME]** received **[service/product]** on **[date]**. Goals: thank them genuinely, request Google review **[link]**, offer **[promotion]**. Tone: **[describe]**. Under 150 words. Include subject line. Use specific service/product details — not a template.

JOB DESCRIPTION

Use this to write a clear, appealing job posting.

Write a complete job posting for a **[role]** at **[company name]**, a **[business type]** in **[city]**. Responsibilities: **[list 5-7]**. Required qualifications: **[list]**. Preferred: **[list]**. Pay: **[\$range]**. Schedule: **[details]**. Include a 3-sentence company description that makes us sound like a genuinely good place to work.

WORKFLOW DESIGN

Use this to map a manual task into an automated workflow.

I own a **[business type]**. My team currently handles **[describe manual task]**. We use **[list software]**. Design a step-by-step automated workflow for this task with minimal human intervention. For each step: what triggers it, what software handles it, what the output is, where human review occurs, and what could go wrong.

ROI ANALYSIS

Use this to prove whether an AI tool is actually paying off.

I have used **[AI tool]** for **[X weeks]** to **[specific task]**. Before: **[X]** hours/week. After: **[X]** hours/week. Tool cost: **[\$X]/month**. My effective rate: **[\$X]/hour**. Calculate: (1) monthly ROI in dollars, (2) payback period in weeks, (3) annualized value. Tell me what to measure to determine if I am at the tool's full potential.

CASH FLOW FORECAST

Use this to build a 13-week cash flow projection.

I am providing 6 months of revenue and expense data: **[paste data]**. Planned expenditures next 3 months: **[list with timing]**. Current cash balance: **[\$[X]]**. AR: **[\$[X]]** due in **[X]** days. Build a 13-week cash flow projection showing: weekly inflows, weekly outflows by category, net position each week, any weeks below my **[\$[X]]** minimum reserve, and recommendations for projected shortfalls.

PRICING STRATEGY ANALYSIS

Use this to find where your prices are leaving money on the table.

My business: **[describe]**. Current pricing: **[list products/services with prices]**. My fully-loaded cost for each: **[list]**. Top 3 competitors and their pricing: **[list]**. Customers choose us because: **[describe]**. Analyze my pricing: (1) where I appear underpriced, (2) price sensitivity by product, (3) whether value-based pricing would benefit me and how to implement, (4) gross margin by product and impact of 5% increase.

VENDOR NEGOTIATION EMAIL

Use this to make your case for a better deal in writing.

Write a vendor negotiation email for **[business name]**. We have been a customer of **[vendor]** for **[X]** years, spending ~**[\$[X]]/month**. We want to negotiate: **[specific ask]**. Our leverage: **[loyalty, volume, payment history]**. Write a professional email making our case, asking for a specific outcome, and setting up a call. Under 250 words. Direct, not apologetic.

PERFORMANCE REVIEW

Use this to write a specific, fair employee review.

Write a performance review for **[employee name]**, **[position]** at my **[business type]**. Strengths this period: **[list]**. Development areas: **[list]**. Measurable results: **[list metrics]**. They **[have/have not]** met their goals. Write 3-4 paragraphs that are specific, honest, and constructive. Include 2-3 measurable development goals for next period. No generic HR language.

Before you use this: Have HR or counsel review; keep it tied to documented performance and watch for protected-class issues.

MEETING NOTES → ACTION ITEMS & OWNERS

Use this to turn a meeting into a clear to-do list.

You are my operations assistant. Here are my notes from a **[team meeting / planning session]: [paste notes]**. Give me: (1) a 3-sentence recap, (2) an action-item table with owner and due date (**[TBD]** where unstated), (3) decisions made, (4) open questions, (5) a short recap message I can send the team. Don't invent items that aren't in my notes.

SOP / PROCESS DOCUMENTATION WRITER

Use this to turn "how we do it" into a trainable one-pager.

You are an operations manager who writes clear procedures. Turn this process into a standard operating procedure someone could follow on day one: **[describe the process step by step, or paste rough notes]**. Output: (1) purpose and when to use it, (2) numbered steps in plain language, (3) tools or access needed, (4) common mistakes and how to avoid them, (5) a quick checklist version. Write for a brand-new employee.

EMAIL FROM BULLET POINTS

Use this to turn a few bullets into a polished email.

Turn these bullets into a clear, professional email for my business. Bullets: **[paste bullets]**. Recipient: **[customer / vendor / employee]**. Goal: **[what I want to happen]**. Tone: **[friendly / formal / direct]**. Under **[X]** words, lead with the main point, end with a clear next step. Include a subject line.

LOCAL SEO / GOOGLE BUSINESS OPTIMIZATION

Use this to tighten your Google presence and get found locally.

You are a local-SEO specialist. My business: **[name, type, city]**. My top services or products: **[list]**. My main local competitors: **[names]**. Audit and improve my local presence: (1) an optimized Google Business Profile description using my key search terms, (2) 5 categories or services to list, (3) 3 Google Posts I can publish this month, (4) the top 5 keywords I should rank for locally, (5) a simple plan to earn and respond to reviews. Keep it doable for an owner, not an agency.

LOYALTY / REFERRAL PROGRAM DESIGNER

Use this to design a simple loyalty or referral program.

You are a customer-marketing strategist. My business: **[type, city]**. Average customer value: **[\$X]** and visit frequency: **[X]**. My goal: **[more repeat visits / more referrals]**.

Design a simple program I can actually run: (1) the structure and the reward, (2) the economics (cost vs. the value of a retained or referred customer), (3) how customers enroll and redeem with **[my tools]**, (4) how I promote it, (5) the one metric to watch.

Keep it easy to administer.

Accounting

TAX RESEARCH MEMO

Use this to frame a research issue — then verify every authority it cites.

You are a senior tax CPA with expertise in **[tax area]**. My client is **[brief description]**. The issue is: **[describe]**. Relevant facts: **[list key facts]**. Research the applicable IRC sections, Treasury regulations, and relevant case law or IRS guidance on this issue. Structure your answer as: Issue, Applicable Authority, Analysis, Conclusion, Areas for Verification. Flag any position that is aggressive or unsettled.

Before you use this: Verify before relying: AI-generated Code sections, regulations, rulings, case names, dollar thresholds, and dates are the #1 hallucination risk. Confirm every authority in a primary source before you advise or file.

YEAR-END PLANNING ANALYSIS

Use this to build a prioritized year-end planning checklist for a client.

You are a senior tax CPA conducting a comprehensive year-end planning review. The client's situation: **[describe key facts — entity type, income level, significant events this year, prior year tax position]**. Generate a prioritized list of year-end planning strategies, organized by estimated tax impact. For each strategy: describe the action, cite the applicable provision, and flag any documentation requirements.

Before you use this: Verify every provision and dollar figure it cites against current law before acting.

CLIENT ADVISORY LETTER

Use this to explain a tax or financial issue to a client in writing.

You are drafting a client advisory letter for a CPA firm. Client: **[name/description]**. Topic: **[describe the tax or financial issue]**. Key points to communicate: **[list]**. Tone: professional but accessible to a sophisticated non-CPA. Length: 2–3 paragraphs. Include a standard disclaimer that this is general information and not a substitute for professional advice specific to their situation.

ENGAGEMENT LETTER DRAFT

Use this to draft a scope-and-fee engagement letter fast.

Draft an engagement letter for a **[type of engagement: e.g., individual tax return, business tax return, audit, advisory]**. Client: **[name]**. Scope: **[describe specifically what is included]**. Exclusions: **[what is explicitly not included]**. Fees: **[fee structure]**. Timeline: **[key dates]**. Include standard CPA engagement letter provisions for professional responsibility, document retention, and dispute resolution.

AUDIT WORKPAPER SUMMARY

Use this to pressure-test a workpaper section before review.

You are a senior CPA reviewing audit workpapers. The engagement is: **[brief description]**. I will provide you with the following workpaper section: **[paste content]**. Identify: (1) any areas where the documentation does not support the conclusion, (2) any required procedures that appear missing, (3) any risk factors that should be escalated, (4) suggested improvements to the workpaper format. Flag everything for my review — do not make conclusions.

Before you use this: Strip client-identifying details before pasting workpaper content into a public tool.

IRS / STATE NOTICE RESPONSE DRAFTER

Use this when a client gets a notice and you need a response plan and a draft.

You are a senior tax CPA. My client received the following notice: **[type, e.g., IRS CP2000 / state notice]** dated **[date]**, proposing **[describe the change or balance]**. The client's relevant facts: **[describe]**. Provide: (1) a plain-English explanation of what the notice is saying, (2) the deadline and what happens if it's missed, (3) the documentation we'd need to respond, (4) a draft response letter, (5) whether agreeing, disagreeing, or partially agreeing looks more supportable. Flag anything I must verify against the notice and the return.

Before you use this: Verify the notice type, deadlines, and any figures against the actual notice and return — do not rely on the AI for those.

WORKER CLASSIFICATION TRIAGE

Use this when a client asks whether someone is a W-2 employee or a 1099 contractor.

You are a senior tax CPA. My client wants to know whether a worker is an employee (W-2) or an independent contractor (1099). Facts about the working relationship: **[describe behavioral control, financial control, and relationship factors]**. Walk through the relevant federal factors, flag any state-law tests that may be stricter, give your lean with reasoning, and list the documentation that would support the chosen classification. Note this is general analysis to verify — not a determination.

Before you use this: State tests (e.g., ABC tests) vary and can be stricter than federal — confirm the rules for the client's state before advising.

BOOKKEEPING CLEANUP & RECONCILIATION WALK-THROUGH

Use this to build a step-by-step plan to clean up messy books.

You are a senior accountant helping me clean up a set of books. The situation: **[describe — software, period, what looks wrong]**. Build a step-by-step cleanup plan covering: (1) reconciling cash and credit-card accounts, (2) finding and fixing miscategorized transactions, (3) clearing undeposited funds and stale items, (4) reconciling loans and payroll liabilities, (5) a closing checklist so it stays clean. For each step, tell me what to check and the most common mistakes.

PROFESSIONAL SERVICE DISCIPLINES

Law

CONTRACT REVIEW

Use this to spot unfavorable terms and gaps in a contract section.

You are a senior attorney specializing in **[practice area]**. I am reviewing a contract on behalf of **[party type: buyer/seller/service provider/client]**. The contract is for: **[describe transaction]**. My client's key concerns are: **[list]**. Review the following contract section and identify: (1) provisions that are unfavorable to my client, (2) missing provisions that should be included, (3) ambiguous language that could create disputes, (4) any red flags I should escalate. **[Paste contract section]**

Before you use this: Redact party names and sensitive terms if you are using a public tool.

LEGAL RESEARCH BRIEF

Use this to map the law on an issue — then confirm every citation yourself.

You are a senior attorney with expertise in **[practice area]** in **[jurisdiction]**. Research the following legal question: **[state the question]**. Provide: (1) the governing statute(s) and key provisions, (2) the leading cases with brief holdings, (3) the current majority rule and any significant minority positions, (4) any recent developments or pending changes, (5) the practical answer to my question with caveats. Flag all citations for independent verification.

Before you use this: Never cite or file an AI-supplied case, quote, or holding without confirming it in a real reporter. Fabricated citations have drawn court sanctions.

DEPOSITION PREPARATION

Use this to prep a witness with likely questions and danger zones.

You are a senior litigator preparing a witness for deposition. The case involves: **[brief description]**. The witness is: **[describe role and expected testimony]**. The opposing counsel's likely strategy is: **[describe]**. Generate: (1) the 20 most likely deposition questions, (2) the 5 most dangerous questions and how to address them, (3) key documents the witness should review, (4) coaching points on demeanor and answering style.

CLIENT INTAKE ASSESSMENT

Use this to size up a new matter before you take it on.

You are a senior attorney conducting an initial client intake. The potential client has described the following situation: **[describe]**. Analyze: (1) the potential legal claims or issues presented, (2) the likely jurisdiction and applicable law, (3) the statute of limitations concerns, (4) immediate actions the client should or should not take, (5) the information and documents needed for a full assessment, (6) any conflicts of interest concerns. This is for internal evaluation only — not client advice.

DOCUMENT / DISCOVERY SUMMARIZER

Use this to digest a long contract, transcript, or production set.

You are a senior attorney's analyst. I will paste a **[contract / deposition transcript / document set]: [paste]**. Produce: (1) a one-paragraph summary, (2) the key terms, dates, parties, and obligations in a table, (3) anything unusual, risky, or internally inconsistent, (4) the 5 points most relevant to **[my issue]**, (5) questions this document raises. Quote exact language for anything important so I can verify it in the source.

Before you use this: Redact privileged or client-identifying material, or use a firm-approved private tool. Verify any quoted language against the source.

PLAIN-ENGLISH CLIENT EXPLAINER

Use this to translate a clause, order, or filing into plain language for a client.

You are a senior attorney explaining a legal document to a client who is not a lawyer. The document or clause: **[paste or describe]**. Write a plain-English explanation that covers: (1) what this means in everyday terms, (2) what it requires the client to do or not do, (3) the risks or trade-offs, (4) the realistic 'so what' for them. Keep it warm and clear, avoid legalese, and note this is general explanation — not advice on their specific situation until I review it.

Wealth Management

QUARTERLY REVIEW PREPARATION

Use this to build an agenda and talking points for a client review.

You are a senior wealth advisor preparing for a quarterly review with a client. Client profile: **[describe — age, risk tolerance, goals, account size range, significant events this year]**. Portfolio context: **[describe allocation generally]**. Market context for this quarter: **[brief description]**. Generate: (1) a 10-point agenda for the meeting, (2) 5 talking points on portfolio positioning relative to client goals, (3) 3 planning topics to raise, (4) questions to ask the client.

INVESTMENT POLICY STATEMENT

Use this to draft an IPS framework for advisor review.

Draft an Investment Policy Statement framework for the following client: **[describe profile — entity type, investment goals, time horizon, liquidity needs, risk tolerance, tax situation, any constraints]**. The IPS should include: purpose and scope, investment objectives, asset allocation targets and ranges, prohibited investments, rebalancing triggers, performance benchmarks, and review schedule. This is a draft for advisor review — not final client delivery.

Before you use this: Advisor must review for SEC Marketing Rule compliance; this is a draft, not client-ready, and should make no performance promises.

CLIENT COMMUNICATION — MARKET COMMENTARY

Use this to write a calm, compliant quarterly client letter.

You are a senior wealth advisor writing a quarterly market commentary for clients. The quarter's key events: **[describe 3-4 key market events]**. Portfolio impact: **[describe generally]**. Forward outlook: **[describe your view]**. Write a 3-paragraph client letter that: (1) acknowledges what happened without alarm, (2) explains how it relates to our investment approach, (3) reinforces confidence in the long-term strategy. Tone: calm, authoritative, reassuring. Avoid specific return figures.

Before you use this: Review under the SEC Marketing Rule before sending — no performance promises, no testimonials, no cherry-picked results.

MEETING NOTES → CRM SUMMARY

Use this to turn client-meeting notes into a CRM-ready summary and tasks.

You are a wealth advisor's assistant. Here are my notes from a client meeting: **[paste notes]**. Produce a CRM-ready summary: (1) attendees and date, (2) life updates and changes in goals, (3) decisions made, (4) action items with owner and target date, (5) topics to raise next meeting. Keep client account numbers out of the summary, and don't infer anything not in my notes.

Before you use this: Keep account numbers and sensitive identifiers out of the prompt.

MARKETING-RULE / REG BI COMPLIANCE CHECK

Use this to sanity-check client-facing copy before it goes out.

You are a compliance reviewer for an RIA. Review the following client-facing copy for red flags under the SEC Marketing Rule and general advertising rules: **[paste copy]**. Flag: (1) performance claims or projections, (2) testimonials or endorsements that need disclosure, (3) cherry-picked or unsubstantiated statements, (4) language that promises results or omits material risk. Suggest compliant rewrites. This is a first-pass check to support — not replace — my CCO's review.

Before you use this: A first-pass aid only — your CCO or compliance counsel makes the final call.

Family Office

FAMILY GOVERNANCE DOCUMENT

Use this to draft a governance framework for the family.

You are the CFO and quarterback of a complex family office. The family has the following structure: **[describe — generations, entities, advisors]**. The governance challenge is: **[describe — e.g., preparing a family investment policy, documenting a family council process, creating a trustee orientation guide]**. Draft a framework document that: (1) states the purpose and scope, (2) defines roles and responsibilities, (3) describes the decision-making process, (4) addresses conflict resolution, (5) includes a review schedule.

Before you use this: Use a private or enterprise AI instance with a data agreement for anything carrying family names or financials — never a public consumer tool.

ADVISOR COORDINATION BRIEF

Use this to run a coordinated meeting across the family's advisors.

I am the family office director coordinating a meeting between the following advisors: **[list — e.g., CPA, estate attorney, investment manager, insurance advisor]**. The agenda topics are: **[list]**. The family's current situation: **[brief description]**. Draft: (1) a pre-meeting briefing memo for the family, (2) a structured agenda with time allocations, (3) a list of decisions that need to be made at the meeting, (4) a post-meeting action item template.

INVESTMENT REPORT NARRATIVE

Use this to write the narrative for a family board report.

You are drafting a quarterly investment report narrative for a family office. Portfolio performance: **[describe return and benchmark comparison generally]**. Major positioning changes this quarter: **[list]**. Market commentary: **[brief description]**. Family-specific context: **[describe any relevant events — liquidity needs, distributions, new commitments]**. Write a 2-page narrative report suitable for a family board presentation. Tone: direct, factual, professional.

BILL-PAY / EXPENSE ANOMALY REVIEW

Use this to scan spending for anything that looks off.

You are a family office controller. Here is a list of expenses for **[period]: [paste amounts, dates, vendors, categories — no account numbers or names]**. Identify: (1) anything that looks like a duplicate payment, (2) amounts well outside the normal range for that category, (3) new or unusual vendors, (4) subscriptions or recurring charges worth reviewing, (5) anything missing you'd expect to see. Rank by dollar impact and tell me what to check.

Before you use this: Strip account numbers and family names — paste amounts, dates, vendors, and categories only.

FAMILY MEETING MINUTES + DECISION LOG

Use this to capture decisions and follow-ups from a family meeting.

You are the family office director. Here are my notes from a family meeting: **[paste notes]**. Produce: (1) formal minutes (attendees, agenda, discussion summary), (2) a decision log listing each decision, who's responsible, and timing, (3) action items with owners and due dates, (4) items deferred to next meeting. Keep the tone neutral and factual; flag any decision that needs a professional's sign-off before it's acted on.

OTHER INDUSTRIES

Retail

PRODUCT DESCRIPTION

Use this to write a description that drives the purchase.

You are a conversion copywriter for independent retail. Write for: Product: **[name]**. Features: **[list]**. Price: **[\$X]**. Store: **[name]**, a **[category]** shop in **[city]**, specializing in **[niche]**. Target customer: **[describe]**. Primary search term: **[keyword]**. Write: (1) 75-100 word description leading with top benefit, including search term naturally, ending with soft purchase prompt. (2) 3 benefit-first bullet points under 15 words each. (3) Meta description under 155 characters. Two variations.

CUSTOMER RETENTION EMAIL

Use this to win back customers who haven't been in lately.

Write a retention email for **[store name]**, a **[retail category]** in **[city]**. Goal: re-engage customers who purchased 3-6 months ago but have not returned. New arrivals: **[list 3-5]**. Exclusive offer: **[describe]**. Brand voice: **[describe]**. Write: (1) 3 subject line options creating curiosity without clickbait. (2) 175-word email that is warm and specific. No "We miss you!" openers.

SEASONAL PLANNING ANALYSIS

Use this to plan inventory and staffing around your season.

I own a **[retail type]** store in **[city]**. Last year monthly sales: **[paste totals]**. Top 5 selling categories: **[list]**. Planned promotions for upcoming **[season]**: **[describe]**. Tell me: (1) Weeks I am most likely understocked. (2) Categories to increase inventory vs. last year. (3) Weeks to adjust staffing for peak traffic. (4) Promotional gaps vs. patterns that work for similar retailers.

INVENTORY ANALYSIS

Use this to find slow movers and tied-up cash in your SKUs.

Analyze my retail inventory data for the last 3 months: **[paste SKU, units sold, on-hand, unit cost, retail price]**. Calculate: (1) Turn rate by SKU. (2) Gross margin % by SKU. (3) Slow movers (turn rate below **[X]**). (4) Understocked fast movers (on-hand below **[X]** weeks of sales). (5) Cash tied up in slow inventory. Recommend my top 3 actions.

STORE EVENT PROMOTION

Use this to promote an event across every channel at once.

Write multi-channel promo copy for **[store name]**, a **[type]** in **[city]**. Event: **[describe]**. Date/time: **[X]**. Offer: **[describe]**. Write: (1) In-store signage headline + 2 supporting lines. (2) Instagram caption + 5 hashtags. (3) Text message under 160 characters. (4) 5 email subject line options. (5) 100-word email body. Tone: **[describe]**. Limit exclamation points.

CUSTOMER SEGMENTATION ANALYSIS

Use this to group customers and target each group right.

Analyze my customer purchase data for the last 12 months: **[paste data with customer ID, date, items, total]**. Identify: (1) Top 20% by annual spend — what they buy, frequency, avg transaction. (2) Lapsed loyals — purchased 3+ times prior year but not in last 6 months. (3) Seasonal-only customers. (4) For each segment, one specific AI-assisted communication campaign tailored to their pattern.

Before you use this: Anonymize first — replace customer names and emails with IDs before pasting.

OTHER INDUSTRIES

Restaurant

SOCIAL MEDIA WEEK

Use this to plan a week of posts in your restaurant's voice.

Social media manager for **[restaurant name]**, a **[cuisine]** in **[city]**. Personality: **[describe]**. Write 5 Instagram posts: (1) **[Signature dish]** — make readers hungry. (2) Behind-the-scenes: **[describe scene]**. (3) This week's special: **[describe]**. (4) Customer testimonial: **[paste quote]**. (5) Community connection: **[describe local involvement]**. Each: 2-3 sentences + 5 hashtags + call to action.

REVIEW RESPONSE

Use this to reply to a review the right way, fast.

Responding to a Google review for **[restaurant name]**, a **[cuisine]** in **[city]** known for **[key attributes]**. Review: **[paste]**. If positive: warm thank-you reflecting our personality, mention one specific detail from their review, invite return. If negative: professional and empathetic, acknowledge the specific issue, explain what we are doing about it, invite direct contact with manager. Under 80 words. Never start with "Thank you for your feedback."

MENU ENGINEERING ANALYSIS

Use this to find your stars, dogs, and margin opportunities.

Here is my menu data for the last 3 months: **[paste table: item name, units sold, food cost %, current price]**. Classify each as Star, Plowhorse, Puzzle, or Dog. For Dogs: recommend remove or reposition. For Plowhorses: how to improve margin or reposition. For Puzzles: tactics to increase sales. Estimate total margin improvement in dollars/month from my top 3 recommendations.

STAFF SCHEDULE

Use this to build a schedule that matches demand without overstaffing.

I manage a **[type]** restaurant seating **[X]**. Sales by day/time last month: **[paste data]**. Minimum coverage: **[describe]**. Staff and availability: **[list]**. Reservations next week: **[list by day]**. Special events: **[list]**. Build a staff schedule that minimizes labor while meeting service standards. Flag any day at risk of being short-staffed vs. reservation count.

Before you use this: Check local predictive-scheduling, break, and overtime rules before posting.

GUEST REACTIVATION

Use this to bring back guests who haven't visited in a while.

Write a guest reactivation campaign for **[restaurant name]**. Guests who haven't visited in **[X months]**. Coming up: **[seasonal specials, new items, events]**. Returning guest offer: **[describe]**. Write: (1) Text under 160 characters — personal not automated, uses **[FIRST NAME]**. (2) Email under 200 words — warmest voice, compelling reason to return, clear offer. (3) Follow-up text if no response after 5 days. Subject line: 3 options.

CATERING PROPOSAL

Use this to turn an inquiry into a clean catering proposal.

Write a catering proposal for **[restaurant name]**. Client: **[name, org]**. Event: **[type, date, time, location]**. Guests: **[X]**. Style: **[plated/buffet/stations]**. Menu: **[list courses]**. Pricing: Food **[\$[X]/person]**, Bar **[\$[X]/person]**, Staffing **[\$[X]**, Rentals **[\$[X]**, Total **[\$[X]**. Write a professional proposal: event summary, menu in appetizing language, clear pricing with deposit requirement, our terms, next steps. Under 600 words.

RECIPE COST ANALYSIS

Use this to price menu items to hit your food-cost target.

Calculate food cost for our recipes. For each recipe, provide: (1) Theoretical food cost in dollars per serving. (2) Food cost % at our current menu price. (3) Suggested menu price to achieve our **[X]%** food cost target. Flag any item where theoretical food cost exceeds 35%. Recipes and current ingredient costs: **[paste data with quantities and prices per unit]**.

OTHER INDUSTRIES

Medical / Dental

PATIENT EDUCATION CONTENT

Use this to explain a procedure or condition in plain language.

Write patient education content for **[practice type]**. Topic: **[procedure or condition]**. Include: (1) Plain-language explanation (10th grade reading level). (2) What patient experiences before, during, and after. (3) Post-care instructions as numbered list. (4) 3 most common patient questions about this. (5) When to call the office. Tone: warm, reassuring, not clinical. Under 400 words. Footer: "Questions? Call **[phone]** or message through the patient portal."

Before you use this: Never include protected health information (PHI). For anything patient-specific, use a HIPAA-eligible service with a BAA.

NEW PATIENT WELCOME LETTER

Use this to make new patients feel they chose right.

Write a new patient welcome letter for **[practice name]**, a **[specialty]** in **[city]**. Dr. **[name]**. Include: location and parking, hours, how to reach us, patient portal setup, what to bring to first appointment, insurance info. Make a new patient feel confident they chose the right practice. Under 300 words. Warm and professional — no form letter language, no excessive disclaimers.

Before you use this: Never include protected health information (PHI). For anything patient-specific, use a HIPAA-eligible service with a BAA.

GOOGLE BUSINESS PROFILE CONTENT

Use this to build a compliant Google Business presence.

Create Google Business Profile content for **[practice name]**, a **[specialty]** in **[city]**.

Differentiators: **[list 3-4]**. Write: (1) 750-character description with location, specialty, differentiators, call to action to schedule. (2) 3 Google Posts (150 words each): patient education topic, practice update/new service, seasonal health reminder. (3) Response to this review: **[paste]**. All HIPAA-compliant — no patient information.

Before you use this: Never include protected health information (PHI) — no patient names or details in posts or replies.

RECALL / REACTIVATION TEXT SEQUENCE

Use this to bring overdue patients back onto the schedule.

You are a patient-communications specialist for a **[dental / medical]** practice. I want to bring back patients overdue for **[cleaning / exam / follow-up]**. Write a 3-touch sequence: (1) a friendly reminder text under 160 characters using **[FIRST NAME]**, (2) a follow-up email a few days later with why the visit matters and an easy booking link, (3) a final short text creating gentle urgency (limited openings). Warm, not pushy. Do not include any health details — just a reminder it's time to schedule.

Before you use this: Never include protected health information (PHI). Keep messages to a generic reminder; use a HIPAA-eligible texting service.

OTHER INDUSTRIES

Real Estate

LISTING DESCRIPTION

Use this to write a listing that books showings.

You are a real estate copywriter who generates showing requests. Write a listing description for: Address/area: **[X]**. Type: **[X]**. BD/BA: **[X]**. Sq ft: **[X]**. Lot: **[X]**. Year built: **[X]**. Key features: **[list 8-10]**. Recent updates: **[list]**. Price: **[\$X]**. Target buyer: **[describe]**. Tone: **[describe]**. 175-225 words. Opening hook that does not begin with "Welcome to." No clichés. 2 variations.

MONTHLY MARKET REPORT

Use this to turn local stats into a client-ready update.

Write a monthly market update for **[agent name]**'s client newsletter covering **[neighborhood/city]**. Data: Active **[X]**, Pending **[X]**, Closed **[X]**, Avg DOM **[X]**, Avg sale/list **[X%]**, Median price **[\$X]** vs **[\$X]** prior month vs **[\$X]** one year ago. Write 3 paragraphs: (1) market conditions in plain language, (2) what this means for a seller considering listing in 90 days, (3) low-pressure call to action for home valuation. Under 250 words.

AGENT RECRUITMENT OUTREACH

Use this to recruit experienced agents to your brokerage.

Write recruitment outreach for **[brokerage name]** in **[city]** seeking experienced agents. Our advantages: **[list 3-4]**. Write: (1) LinkedIn connection request under 300 characters. (2) Follow-up email after connection under 200 words. (3) One-page brokerage overview outline: culture, tools and support, commission structure, production expectations. Specific not generic — no "we're a family" language.

REFERRAL PARTNER OUTREACH

Use this to build referral relationships with other professionals.

Write outreach for **[agent name]** in **[city]** specializing in **[specialty]** to **[referral partner type: estate attorney, CPA, financial planner]**. Write: (1) Initial email proposing coffee meeting under 150 words. (2) Follow-up if no response after 10 days under 100 words. (3) Monthly market update email to established referral partners — genuinely useful, shareable with their clients. (4) Co-branded social post template both can share.

BUYER CONSULTATION / NEEDS ANALYSIS

Use this to prep a sharp first meeting with a new buyer.

You are a top buyer's agent preparing for a first meeting with a new buyer. What I know so far: **[budget, location, must-haves, timeline, financing status]**. Prepare: (1) a 12-question needs-analysis to run the meeting, (2) the 5 things I should educate this buyer about in today's **[city]** market, (3) the documents and pre-approval steps they need next, (4) how I'd summarize their criteria back to them, (5) red flags that suggest they're not ready yet. Practical and client-friendly.

OTHER INDUSTRIES

Construction / Trades

PROJECT PROPOSAL

Use this to turn an estimate into a proposal that closes.

Write a project proposal for **[company name]**, a **[trade type]** in **[city]**. Customer: **[name, address type]**. Scope: **[detailed description]**. Estimate: Materials **[\$[X]**, Labor **[\$[X] ([X] hrs at \$[X]/hr)**, Subs **[\$[X]**, Overhead and margin **[\$[X]**, Total **[\$[X]**. Timeline: **[X]** weeks starting **[date]**. Include: (1) Problem/solution summary, (2) Scope in plain language, (3) Clear investment presentation, (4) What is NOT included, (5) Warranty terms, (6) Signature block. Under 600 words.

POST-PROJECT FOLLOW-UP SEQUENCE

Use this to lock in reviews, referrals, and repeat work.

Create a post-project communication sequence for **[company name]**. Project for **[FIRST NAME]: [describe]**. Write: (1) Completion email — thank them, confirm warranty, request Google review with **[REVIEW LINK]**. (2) 90-day follow-up — check satisfaction, offer **[maintenance/inspection service]**. (3) 1-year anniversary — reference original project, note warranty coverage, offer referral incentive: **[describe]**. Relationship-focused, not transactional.

ESTIMATING ANALYSIS

Use this to find where your estimates miss and why.

I am a **[trade type]** contractor. Here is my job cost data — estimated vs. actual for last 12 months: **[paste data]**. Analyze and tell me: (1) Avg actual gross margin by job type. (2) Job types I consistently underestimate and by how much. (3) Which line items (labor, materials, subs) have the most variance. (4) My most and least profitable job types. (5) If I had correctly estimated losing jobs, what would annual gross profit have been? Recommend 3 changes to my estimating process.

SOCIAL MEDIA AND REVIEW REQUEST

Use this to show off a finished job and earn a review.

Create content for **[company name]**, a **[trade type]** in **[city]**. We just completed: **[describe project]**. Write: (1) Instagram/Facebook post — descriptive, proud, community-focused, no customer address. (2) Before-and-after caption pair. (3) Follow-up email requesting a Google review referencing the specific project with link: **[URL]**. (4) 90-day follow-up offering **[maintenance/inspection]**. Professional, confident, not salesy.

OTHER INDUSTRIES

Salons / Spas

SOCIAL MEDIA CONTENT WEEK

Use this to plan a week of posts that fill the chair.

Social media manager for **[salon name]**, a **[type]** in **[city]** specializing in **[specialty]**. Personality: **[describe]**. Write 5-post week plan: (1) Before-and-after: service was **[describe]**. (2) Product we love: **[product and why]**. (3) Educational tip showing expertise in **[topic]**. (4) Team spotlight: **[member]** who specializes in **[specialty]**. (5) Upcoming promotion/event: **[describe]**. Each: 2-3 sentences, 5 hashtags, call to action.

CLIENT REACTIVATION SEQUENCE

Use this to rebook clients who've drifted away.

Write a reactivation sequence for **[salon name]**. Clients not booked in **[X months]**. Returning offer: **[describe]**. Write 3-touch sequence: (1) Text now under 160 characters — personal, uses **[FIRST NAME]**, not generic. (2) Follow-up email 3 days later: what's new **[list 3 things]**, clear offer, 1 testimonial, booking link. Under 200 words. (3) Final text 7 days after email — brief, creates limited availability without desperation. Personal, warm — as if from their stylist.

PRICING STRATEGY

Use this to find where you can raise prices without losing clients.

I am a **[salon type]** owner in **[city]**. Current service menu and prices: **[list]**. Providers: **[X]**. Avg weekly appointments per provider: **[X]**. Monthly costs: Rent **[\$[X]**, Payroll **[\$[X]**, Products **[\$[X]**, Other **[\$[X]**. Last price increase: **[X years ago]**. Tell me: (1) Whether my prices are below/at/above market. (2) Services with most room for a price increase. (3) What 10% increase on top 3 services adds monthly. (4) How to communicate a price increase without losing clients.

RETAIL RECOMMENDATION SCRIPTS

Use this to help stylists recommend products naturally.

You are a salon retail sales trainer. We sell **[product line(s)]**. Write 5 natural, non-pushy recommendation scripts for stylists: (1) During shampoo — treatment product. (2) During blowout — styling product. (3) After color service — color-preserving product. (4) When client mentions hair concern: **[frizz/damage/thinning]**. (5) At checkout — mentioning online store for reordering. Each 2-3 sentences, feels like advice from a trusted professional, not a sales pitch.

OTHER INDUSTRIES

Logistics / Delivery

CUSTOMER COMMUNICATION TEMPLATES

Use this to keep customers informed at every delivery step.

Build customer communication templates for **[company name]**, a **[type]** operation in **[city]**. Clients are **[describe]**. Create 5 templates: (1) Delivery confirmation with estimated window. (2) Out-for-delivery with driver name. (3) Delivery confirmed with POD reference. (4) Delivery exception — not delivered, reason, next steps. (5) 24-hour satisfaction follow-up. Each: text version under 160 chars + professional email version. Direct, reassuring, proactive.

SERVICE PROPOSAL

Use this to win a route or account from a national carrier.

Write a service proposal for **[company name]**, a **[logistics type]** in **[city]**. Prospect: **[company name, type]**. Their logistics challenge: **[from discovery conversation]**. Proposed service: **[routes, frequency, vehicles, tracking]**. Pricing: **[model]**. Advantages over national carriers: **[list 3]**. Write 1-page proposal: (1) restate their challenge in their terms, (2) solution and why it fits, (3) clear pricing, (4) differentiation with evidence, (5) concrete next step. Under 500 words.

DRIVER PERFORMANCE COACHING

Use this to coach drivers using your telematics data.

Analyze my fleet telematics data for the last 30 days: **[paste: driver name, miles, fuel consumed, idle time, hard braking, hard acceleration, on-time rate, customer satisfaction]**. Identify: (1) Top 3 performing drivers and what distinguishes them. (2) 3 drivers with most improvement opportunity and specific behaviors to address. (3) Estimated monthly fuel savings if bottom 3 matched top 3 fuel efficiency. (4) Coaching conversation outline for one-on-one with lowest performer — specific, supportive, not punitive.

Before you use this: Strip driver names before pasting telematics data; keep coaching tied to documented metrics, not assumptions.

OTHER INDUSTRIES

E-Commerce

PRODUCT CONTENT BATCH

Use this to write listings for many products at once.

You are a conversion copywriter for e-commerce. For each product: (1) 75-word description leading with primary benefit, including search term naturally, ending with soft purchase prompt. (2) SEO title under 60 characters. (3) Meta description under 155 characters. (4) 3 benefit-first bullet points under 15 words each. Format each product's output clearly separated. Products: **[paste list: name, features, target customer, search term, price]**.

ABANDONED CART EMAIL SEQUENCE

Use this to recover carts before they go cold.

Write an abandoned cart sequence for **[store name]** selling **[product category]**. Cart contains: **[product name, price, key feature]**. Write 3 emails: (1) 1 hour after — gentle reminder, lead with primary benefit, under 100 words. (2) 24 hours — address most common hesitation: **[describe]**, include trust signal: **[review/guarantee]**, under 150 words. (3) 72 hours — create urgency based on **[limited stock/sale ending]**, under 100 words. Different subject line for each. Never use "[NAME], you forgot something."

CUSTOMER SERVICE RESPONSE

Use this to answer a tricky customer message on-policy.

Draft a customer service response for **[store name]** selling **[category]**. Customer message: **[paste]**. Our relevant policy: **[paste policy]**. Write a response that: (1) acknowledges the situation without admitting fault, (2) states our policy clearly in plain language, (3) offers the best resolution available under our policy, (4) ends warmly and invites follow-up. Under 150 words. Professional but warm — not legalistic.

AD CREATIVE

Use this to write ad copy across Google, Meta, and TikTok.

You are a direct response copywriter. Product: **[name, description]**. Price: **[\$X]** (sale from **[\$X]** if applicable). Target audience: **[demographics, motivation]**. Differentiators: **[list 3]**. Write: (1) Google Shopping headline under 30 chars + description under 90 chars. (2) 3 Facebook/Instagram body copy variants: benefit-driven, social proof-driven, urgency-driven. Each under 125 words. (3) TikTok script: 15-second scroll-stopping hook + 15-second problem-solution + 5-second CTA. One clear CTA throughout.

CLV ANALYSIS

Use this to see who your best customers are and keep them.

Analyze 12 months of order data: **[paste with customer ID, date, order value, products]**. Calculate: (1) Average customer lifetime value. (2) CLV by acquisition channel if available. (3) Retention rate: % of Month 1-6 customers who purchased in Month 7-12. (4) Customer segments: one-time buyers, repeat (2-3 purchases), loyal (4+). (5) Revenue distribution by segment. Recommend the 2 highest-ROI retention investments based on this data.

Before you use this: Anonymize first — replace customer names and emails with IDs before pasting.

BRAND CONTENT STRATEGY

Use this to plan 90 days of content that attracts buyers.

You are a content strategist for e-commerce brands. My store: **[name]** selling **[category]** to **[target customer]**. Brand voice: **[describe]**. My most loyal customers love us because: **[what makes you different]**. Build a 90-day content plan: (1) Weekly email newsletter structure — what each covers, word count, CTA. (2) Social media posting rhythm by day — what type of content each day. (3) 4 blog post topics per month to attract target customer via search. (4) How these streams connect. Require no more than **[X]** hours/week of AI-assisted work.

ONE LAST THING

Make it yours.

The best prompt is the one you've tuned to how you actually work. Save the ones that land, tweak the brackets, and build your own short list. When an answer matters, verify it.

The whole library, one click away. Find every prompt here as a free interactive tool at baratelliinstitute.com/tools. — The Baratelli Institute · Mentoring at Scale · June 2026