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PROMPT LIBRARY

THE PROMPT PACK

For ***AI Rules for Your Business***
by Don Sykes

41 ready-to-use prompts, two or three for every chapter plus three that work anywhere. Every prompt carries the book's rails: ask instead of guess, flag what needs checking, and end with a list of what a person must verify.



Sykesystem *Publishing*

The Companion Collection
Version 1.1 · October 16, 2026

THE PROMPT PACK

This is the free companion to *AI Rules for Your Business*: 41 prompts, two or three for each chapter, plus three that work anywhere. Each one does a piece of the book's work for you, and each one carries the book's rules inside it.

HOW TO USE THESE PROMPTS

Every prompt ends with the same paragraph. It tells the tool to ask instead of guess, to write [CHECK] beside anything a person has to confirm, and to finish with a list titled "Check before you use this." Leave that paragraph exactly as it is, even if you think you could word it better. It's the reason these prompts are safe to hand to anyone on your payroll.

Give it a color before you paste it. The card in Chapter 5 (T-3) decides what goes into any AI tool. Green is fine on any tool. Yellow goes only into a company account, after names and numbers come out. Red never goes in, anywhere. Each card's "Have ready" line says what to scrub, and PP-5.1 does the swapping for you.

Nothing here produces a finished anything. What comes back is a draft and a list of what to check. A person holds each item against its source before anything leaves the building.

How to read a card. *Use when* says when it earns its keep. *Have ready* says what to gather and what to scrub. *The prompt* is ready to paste: fill in the [BRACKETED] slots and leave everything else alone. The prompts use plain straight quotes on purpose, so they paste cleanly into any tool. *Good output looks like* tells you what a useful answer looks like, and when to run it again. *Before you use it* is the human check that comes after.

VERSION 1.1 · OCTOBER 16, 2026 Maintained online. AI tools change faster than any printed page, so this pack lives on the download page at sykesystem.com, where the current version and its date are posted. If the version above is older than the one on that page, download the new one before you rely on this copy.

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Chapter 1. Are My People Already Using AI?

PP-1.1

Survey Tally Reader

USE WHEN your T-11 survey sheets are back and tallied, and you want help reading what they say.

HAVE READY the counts for each question, plus the written answers to questions 2, 6, and 7, typed up. Scrub first: remove any customer names, addresses, or job details people wrote in, and anything that would point to who wrote a sheet.

THE PROMPT · COPY EVERYTHING IN THE BOX

I run a [TRADE] company with [NUMBER] people. We ran an anonymous eight-question survey about how our people use AI at work, and I promised nobody would get in trouble for their answers. Below are the tallied counts and the written answers. Do not try to work out who wrote anything, and do not guess at it. Give me four things. First, how widespread AI use is, from question 1, and what the number of blank or unreturned sheets says about whether people trusted the survey. Second, what's going into these tools, from questions 4 and 5, especially personal accounts and any yes or not-sure on customer information. Third, what's coming out wrong, from question 6, grouped into themes, quoting the short phrases that show each theme. Fourth, which of these to work on first: what goes into the tools (Chapter 5), how we check what comes out (Chapter 6), or AI features inside our software that nobody turned on (Chapter 14), with one sentence of reasoning. Use plain words. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Sheets handed out: **[NUMBER]**. Sheets returned: **[NUMBER]**. Blanks: **[NUMBER]**.
Tally and written answers: **[PASTE THE SCRUBBED TALLY]**

GOOD OUTPUT four short sections and one clear "start here," with the counts quoted back exactly as you gave them.

BEFORE YOU USE IT check every number it repeats against your own tally sheet. If it names or hints at who wrote something, delete that part and don't repeat it. The amnesty was your promise, not the tool's, and it still binds you.

PP-1.2

Amnesty Announcement Drafter

USE WHEN you're about to hand out the survey and want to say the amnesty in your own words without losing the sentence that makes it work.

HAVE READY five minutes, and an honest answer to how you normally talk at a shop meeting.

THE PROMPT · COPY EVERYTHING IN THE BOX

I'm handing out an anonymous survey at my company's next meeting about how people use AI at work. Help me write what I'll say when I hand it out. Before you draft anything, ask me up to five questions, one at a time, about how I talk to my crew: how formal I am, how long I usually talk, what time the meeting is, and anything about my company the crew would expect me to mention. Then write a short announcement I can say out loud in under one minute, under 150 words, in my voice. It must include this sentence word for word: "Nobody gets in trouble for anything on this paper. I need to know where we actually stand." Do not soften it, add conditions to it, or put it in quotation marks as if I'm reading. Do not promise anything I didn't tell you to promise: no rewards, no deadlines, and no follow-up meetings I didn't mention. Include that I filled one out myself. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

GOOD OUTPUT a few questions first, then a short paragraph that sounds like you talking, with the amnesty sentence intact.

BEFORE YOU USE IT say it out loud once at home. Every promise in it is now yours to keep, so cut any you won't. And actually fill out a survey yourself before you say you did.

Chapter 2. Who Answers When the AI Is Wrong?

PP-2.1

Pre-Send Checker

USE WHEN any AI-drafted document is about to leave your building: a quote, a customer email, a proposal, a letter.

HAVE READY the draft. Scrub it first, following the card in Chapter 5: red comes out by hand, and PP-5.1 swaps the rest for placeholders. If anything about a customer is still in it, it's yellow, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

> You drafted the document below, or a tool like you did. Before anyone sends it, I need to know exactly what to verify. Do not fix the document and do not tell me it looks good. Produce a numbered worklist of every item in it that a person must confirm: every number, price, and date; every claim about codes, regulations, or manufacturer requirements; every promise, commitment, or anything a customer could hold us to; and anything that sounds like our policy. For each item, give me three things: the exact line, why it's a risk if wrong, and the real-world source to check it against (a price book, a contract, a manual, a person). If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> Document: **[PASTE THE SCRUBBED DRAFT]**

GOOD OUTPUT a numbered list, not reassurance. If it says the document looks fine, run it again; it missed the assignment.

BEFORE YOU USE IT the worklist is the start of checking, not the end. A person still holds each item against the source, because the tool's job ended when it found the claims.

PP-2.2

Who-Signs Map Builder

USE WHEN you're naming who checks and who sends each kind of paper that leaves your company, and you want help seeing all of it.

HAVE READY a rough list of what goes out the door in writing (quotes, invoices, emails, proposals, posts), and the first names or job titles of the people involved. No customer information needed.

THE PROMPT · COPY EVERYTHING IN THE BOX

I run a [TRADE] company with [NUMBER] people. I want to name, for every kind of written work that leaves my company, three people: who asks the AI tool for a draft, who checks it against the real source, and who sends it and answers for it. Do not build anything yet. Interview me first, one question at a time: what kinds of things leave the building in writing, who usually writes each one, what source each one should be checked against (price book, schedule, contract, manual), and, for each, whose phone rings if the customer calls angry. Then give me a table with one row per kind of work and four columns: who asks, who checks, what they check it against, and who sends. Where the same person fills two jobs on something with a price, a promise, or a safety step in it, flag it so I can decide whether that's okay. Where I haven't named anyone, write [DECIDE] instead of choosing for me. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

GOOD OUTPUT a handful of questions, then a table with every row filled or flagged, and no names you didn't give it.

BEFORE YOU USE IT tell each person on the map, out loud, that it's their name now. A name on a table they've never seen checks nothing.

PP-2.3

Sixty-Second Read Script

USE WHEN you're about to send something AI helped write, and you want the sixty-second read to catch what skimming misses.

HAVE READY the draft, scrubbed the way the card in Chapter 5 says: red comes out by hand, and PP-5.1 swaps the rest for placeholders. If anything about a customer is still in it, company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

I'm about to read the draft below out loud, start to finish, before I send it. Turn it into a checking script for that read. Do not rewrite, improve, or shorten the draft; every sentence stays exactly as written. Mark every number, price, date, time, name, and promise with **[CHECK]** in bold right after it. After each paragraph, add one short line in brackets telling me what to check that paragraph against, for example [price book], [the schedule], [the contract], or [ask the person it names]. At the end, list any sentence a customer could read as us agreeing to give, waive, refund, or guarantee something, word for word. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Draft: **[PASTE THE SCRUBBED DRAFT]**

GOOD OUTPUT your draft, word for word, with bold [CHECK] marks and a short bracket after each paragraph, then the list of anything that sounds like a promise.

BEFORE YOU USE IT read it out loud, actually holding the price book or schedule where it says to. The script tells you where to look. It doesn't look for you. A waived fee hides in a friendly last paragraph; read that one twice.

Chapter 3. Should I Just Ban It?

PP-3.1

Position Picker

USE WHEN you're deciding whether to ban AI, manage it, or buy a company tool, and you want the reasoning written out where your crew can see it.

HAVE READY your survey tally (scrubbed) and a rough sense of what each part of your company does: office, field, sales, bookkeeping.

THE PROMPT · COPY EVERYTHING IN THE BOX

I run a [TRADE] company with [NUMBER] people. I need to pick my company's position on AI, area by area. The four positions are: ban (nobody uses these tools for this work), managed use (some work yes, some information never, and someone checks what goes out), company tool (we pick and pay for one tool and everyone uses that), and silence (no rule). Silence is not an option I'll accept, so don't recommend it. Interview me first, one question at a time: what each area of my company does, whether that work happens where I can see it, whether it's on equipment I control or on people's own phones, how often AI would help with it, and what information that area handles. Then, for each area, recommend exactly one position: ban, managed use, or company tool. Give two or three sentences of reasoning in plain words that I could post on a wall. A ban only makes sense where I can see the work, control the equipment, and the work isn't constantly pulling people toward the tool; say which of those three hold. Where the answer depends on something only I can decide, write [DECIDE]. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Survey tally: **[PASTE THE SCRUBBED TALLY]**

GOOD OUTPUT one recommendation per area, short reasons, and no area left on silence.

BEFORE YOU USE IT the position is yours, not the tool's. If you disagree with a recommendation, go with your call and write down your reason. That written reason is worth more than the tool's.

PP-3.2

Yes-and-Never List Builder

USE WHEN you've picked managed use and need your first yes list and never list, built from what your crew is already doing.

HAVE READY the top three uses you circled on your survey tally, and the list of information your company handles (customer details, codes, pricing, payroll). Scrub any real examples before pasting.

THE PROMPT · COPY EVERYTHING IN THE BOX

I run a [TRADE] company. My crew already uses AI for the three things below. Help me build two short lists. The yes list is work where AI is allowed: it should be work that comes up often, is routine, carries no sensitive information, and where a mistake would be obvious to the person reading it. The never list is information that never goes into any AI tool. Ban nouns, not verbs: name the specific kinds of information (customer names and addresses, gate and alarm codes, payroll, our cost numbers, anything with an account number) and the one kind of decision AI never makes (any answer that touches safety). Sort each of my three uses into yes, never, or ask-first, with one sentence on why. Anything involving prices, estimates, code questions, or promises to customers goes to ask-first, not yes. Then add the nouns from my information list that belong on the never list. Write each line so someone could check whether it was followed. Keep each list to five lines or fewer. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Our top three uses: **[1. _____ 2. _____ 3. _____]**
Information we handle: **[LIST, NO REAL EXAMPLES]**

GOOD OUTPUT two short lists, each line specific enough to check, and each of your three uses sorted with a one-line reason.

BEFORE YOU USE IT say both lists out loud at a crew meeting and date the sheet. Then copy them into sections 2 and 3 of your one page (T-1).

Chapter 4. What Goes on the One Page?

PP-4.1

One-Page Rules Interviewer

USE WHEN you're writing your one-page AI rules (T-1) and don't want to start from a blank template.

HAVE READY your survey tally (scrubbed), your yes list and never list from Chapter 3, and twenty minutes.

THE PROMPT · COPY EVERYTHING IN THE BOX

I own a small company and I'm writing a one-page set of AI rules my crew will actually read. Do not draft anything yet. First, interview me: ask one question at a time about who the rules cover, what work AI is allowed to draft, what information never goes into a tool, who checks things before they go out, what's completely off limits, and who answers when something goes wrong. Use plain words a field crew would use. After I've answered, draft the one page in my words, under 350 words, at an eighth-grade reading level, with a signature block. Where my answers left a gap, put [DECIDE] with a one-line note instead of filling it in yourself. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

GOOD OUTPUT eight to twelve questions first, then a page that sounds like you, with [DECIDE] flags where it needed your call and didn't get one.

BEFORE YOU USE IT read it out loud to one employee before the crew meeting. Every [DECIDE] gets your answer, not the tool's.

PP-4.2

Plain-Language Translator

USE WHEN you have a policy, a rule, or a page from somewhere else (a law firm template, a customer's requirements, your own first draft) and it reads like a contract instead of like you.

HAVE READY the text. If it carries anything from a real job, scrub it first, following the card in Chapter 5: red comes out by hand, and PP-5.1 swaps the rest for placeholders. Anything about a customer left in it means company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

> Rewrite the text below so a field crew can read it out loud and understand it the first time: an eighth-grade reading level, short sentences, everyday words. The rule here is strict: change the words, never the requirement. Every "must," "never," deadline, amount, name, and condition in the original has to survive with the same meaning. Do not add rules, drop rules, soften rules, or make them stricter. If a sentence can't be made plainer without changing what it requires, leave it as written and mark it [DECIDE] with a one-line note on what makes it hard. After the rewrite, give me a two-column list: each original sentence you changed, and what you changed it to, so I can check them side by side. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> Text: **[PASTE THE SCRUBBED TEXT]**

GOOD OUTPUT a shorter, plainer version, then the side-by-side list. A few [DECIDE] flags is a good sign; it means the tool stopped instead of guessing.

BEFORE YOU USE IT read the side-by-side list, not just the new version. Any line where the meaning moved goes back the way it was. If the original came from a lawyer or a customer contract, give your crew the plain version and keep the original in the file, because a dispute gets settled on the original.

PP-4.3

Confusion Finder

USE WHEN your one page is drafted and you want to find the confusing lines before your crew does.

HAVE READY your draft one page, scrubbed of real names except the person to ask, plus one sentence about who your crew is (trade, size, office and field).

THE PROMPT · COPY EVERYTHING IN THE BOX

Play a new hire at my company, in their first week. You're good at your trade, you've used a chatbot on your phone a few times, and you've never seen an AI policy. Read the one page below the way that person would, then do three things. First, list every question this page leaves you unable to answer, in your own words, the way you'd ask it in the shop, for example "Does a photo of a nameplate count as customer information?" Second, list every line you could read two different ways, and give both readings. Third, list any rule you couldn't tell whether you'd followed, standing in a customer's driveway. Do not rewrite the page and do not suggest answers; finding the gaps is the whole job. Stay in character as the new hire. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

About my crew: **[ONE SENTENCE]**
My one page: **[PASTE THE DRAFT]**

GOOD OUTPUT five to fifteen questions in shop language, a handful of two-way lines, and no rewritten page. If it says the page is clear, run it again and ask for the three hardest questions.

BEFORE YOU USE IT this is a rehearsal, not the read-aloud. Fix what it finds, then still have a real employee read the page out loud. A real person will find the one question no tool thought of.

Chapter 5. What Can My People Never Paste In?

PP-5.1

Data Scrubber

USE WHEN you have a job note, email, or other working text (yellow on the card) that needs names and numbers stripped before an AI tool helps you with it.

HAVE READY the text, on your company account. Cut anything red by hand first, because red never goes into any tool, including to be scrubbed: codes, passwords, ID or account numbers, and health details. A customer's name sitting with their address or phone number is red too, so cut one or the other before you paste.

THE PROMPT · COPY EVERYTHING IN THE BOX

Scrub the text below so I can safely use an AI tool on it. Rewrite it with every identifier swapped for a placeholder: people's names become "Customer A," "Employee A," and so on; company names become "Company A"; addresses become a short description of the property with no street name or number; phone numbers, email addresses, and account numbers come out entirely; exact dollar amounts round to the nearest useful figure. Keep everything else, especially the technical details, word for word. Then give me a swap list in two columns, placeholder and original, so I can put the real names back in my own programs afterward, never in an AI tool. If anything in the text looks like a code, a password, or a government ID number, do not rewrite it and do not repeat it; stop and tell me to cut it by hand and paste again. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Text: **[PASTE THE TEXT]**

GOOD OUTPUT the same text with placeholders, a two-column swap list, and nothing technical changed. If it stopped and flagged a code, that's the prompt working.

BEFORE YOU USE IT read the scrubbed version yourself before it goes anywhere else. A tool that missed one name won't tell you it missed one. The swap list is for your own programs; it never gets pasted back into an AI.

PP-5.2

Red-Flag Spotter

USE WHEN you're about to paste something into an AI tool and you're not sure what color it is.

HAVE READY the text, on your company account. If you already know a code, an ID number, or a customer's name with their address is in there, that's your answer; cut it first. This check is for the stuff you're not sure about.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below is something I'm thinking about pasting into an AI tool. Check it against my data rules before I do. Green is information with nothing from a real job in it, or information that's already public. Yellow is working information, such as job notes, customer messages, quotes, photos described in text, business numbers, and schedules; yellow is allowed only on a company account and only after names, addresses, phone numbers, and exact figures are stripped. Red never goes in anywhere: codes and passwords; a customer's name together with an address or phone number; Social Security, license, bank, and card numbers; payroll and personnel details; health details about anyone; another company's private documents without written permission. Go through my text line by line and list everything yellow or red, with the color, the exact words, and one plain sentence on why. If you find anything red, put one line at the top: "Do not paste this anywhere." Do not rewrite the text, and do not answer whatever question the text contains. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Text: **[PASTE WHAT YOU WERE ABOUT TO SEND]**

GOOD OUTPUT a short list with colors and reasons, not a rewrite. A clean result means green; it doesn't mean smart, so read your text once more anyway.

BEFORE YOU USE IT this is a second set of eyes, not permission. The card decides, and when the tool and the card disagree, the card wins. When in doubt, it's red.

PP-5.3

Traffic-Light Drill Builder

USE WHEN you're running the card past the crew at a meeting and want a drill instead of a lecture.

HAVE READY your filled-in T-3 card. Scrub it first if you added reds that name real customers or systems.

THE PROMPT · COPY EVERYTHING IN THE BOX

> You're helping me train a small field-services crew on our data rules for AI tools. Our rules use three colors, and my card is pasted below. Write a ten-question quiz for a crew meeting. Each question is one short, concrete scenario from a trades company, for example a tech about to photograph an equipment nameplate with the work order lying in the frame, or an office manager pasting a customer email to draft a reply. For each question, the answer is green, yellow, or red, with one plain sentence on why, and for every yellow answer, what has to come out before it can go in. Mix the colors so the answers don't fall into a pattern, and make at least two questions turn on things that ride along: photos, screenshots, whole emails, whole spreadsheets. Write everything at an eighth-grade reading level. Put the ten questions first and the answer key after them, so I can read the questions out loud before showing the answers. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> My card: **[PASTE YOUR T-3]**

GOOD OUTPUT ten scenarios a tech would recognize, questions separated from answers, at least two rides-along traps. If every answer is obvious, run it again and ask for harder calls.

BEFORE YOU USE IT read the answer key against your own card before the meeting. Where the quiz and your card disagree, fix the quiz, and if the disagreement survives a second look, that line of your card needs plainer words.

Chapter 6. How Do We Catch Mistakes Before the Customer Does?

PP-6.1

Quote Cross-Examiner

USE WHEN a quote or proposal is drafted and you want every number in it traced to the price book before it goes.

HAVE READY the quote and the price-book lines it should match, both scrubbed: the customer becomes "Customer A," and the address comes out. Paste the price book's sell prices only, never its cost or margin columns. A quote is yellow on the card, so this runs on a company account only. No company account yet? Do this check by hand with T-4.

THE PROMPT · COPY EVERYTHING IN THE BOX

> Below are a quote and an excerpt from my price book. The price book is the only source for prices at my company. Check the quote against it. Make a table with one row for every number in the quote, including quantities, unit prices, line totals, discounts, fees, and the grand total, with four columns: the line from the quote, the number, the matching price-book line, and a result of MATCH, DIFFERENT, or NOT IN PRICE BOOK. Then redo the arithmetic: do the line totals and the grand total add up from the numbers given? Show the math for any that don't. Do not suggest new prices, do not fill in a missing price, and do not round anything. Separately, list every claim in the quote that the price book can't settle, such as tax credits, rebates, efficiency ratings, warranty terms, financing, and dates, and name where a person should check each one. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> Quote: **[PASTE THE SCRUBBED QUOTE]**
> Price book excerpt: **[PASTE THE MATCHING LINES]**

GOOD OUTPUT a table where every number in the quote has a row, then a short list of the claims the price book can't settle. Every DIFFERENT or NOT IN PRICE BOOK row is your first phone call.

BEFORE YOU USE IT treat the table as a list of places to look. Open the price book yourself for every row that didn't match, and run the arithmetic on a calculator, not in the tool. Anything over your dollar line still gets a second set of initials on T-4.

PP-6.2

Four-Trigger Scanner

USE WHEN any draft is about to leave the building and you want to know exactly what in it needs checking.

HAVE READY the draft. If nothing about a customer is in it (an insert, a handout, a post), it's green and any tool is fine. If something is, scrub it first (PP-5.1), and it's yellow: company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

Scan the draft below for four kinds of things that must be checked before it goes to a customer. Numbers: prices, totals, dates, times, quantities, sizes, and model numbers. Rules: code requirements, manufacturer requirements, warranty terms, tax credits, rebates, laws, or anything described as our policy. Safety: any step involving gas, electricity, refrigerant, heights, or a safety control. Promises: anything a customer could hold us to, such as free, waived, guaranteed, included, or a date or time. List every one you find under those four headings. For each, quote the exact words, then name the kind of source a person should check it against, for example the price book, the manufacturer's manual for that model, the code book, the IRS website, or the person allowed to make that promise. Do not tell me whether anything is correct; your job is finding, not checking. Do not rewrite the draft. If any step tells someone to jumper, bypass, disable, or override a safety control, put it at the very top with the words "A person decides this. Do not follow it." If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Draft: **[PASTE THE DRAFT]**

GOOD OUTPUT four headings, every item quoted word for word with a source beside it, and nothing marked correct. It copies straight into step 2 of T-4.

BEFORE YOU USE IT every item on the list is still unchecked. A tool that wrote an out-of-date claim still believes it, so it will list that claim calmly. Go to the source anyway. If a heading comes back empty, read the draft once more for that one yourself.

PP-6.3

What-Went-Wrong Talk Writer

USE WHEN somebody caught a mistake (a spot check, a customer, a lucky phone call) and you want the whole crew to learn from it without anybody wearing it.

HAVE READY a few lines about what happened, with no names in them: not the employee's, not the customer's. Leave out anything red on the card.

THE PROMPT · COPY EVERYTHING IN THE BOX

Help me turn a mistake my company caught into a short talk for a crew meeting at a [TRADE] company. My notes are below. Do not use or guess anyone's name, and do not say or hint at who was at fault; the point is the process, not the person. Write it so I can read it out loud in about five minutes: under 650 words, at a sixth-grade reading level, in plain spoken sentences. Use this order: what happened, told as a short story; why it looked right to the person who made it; which of our four triggers it was (a number, a rule, a safety step, or a promise); what source would have caught it; and the one thing we do differently starting today. End with one question I can ask the crew, such as where else this could happen. Include this sentence word for word near the start: "Nobody gets in trouble for telling." Do not add rules I didn't give you, and do not make the mistake sound bigger or smaller than my notes say. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

What happened: **[YOUR NOTES, NO NAMES]**
What we're changing: **[ONE LINE]**

GOOD OUTPUT a talk that sounds like you on a Monday morning, the amnesty line near the top, no names anywhere, and one question at the end.

BEFORE YOU USE IT read it out loud once by yourself. Cut anything that points at a person even without a name, because “the new guy” is a name in a shop of thirty. Check every fact in it against your own notes before you check anything else.

Chapter 7. Which AI Tools Should We Pay For?

PP-7.1

Terms Decoder

USE WHEN you’re filling in T-8 and the vendor’s privacy or terms page reads like it was written to be skimmed.

HAVE READY the text of the tool’s privacy, trust, or business-plan page, copied from the vendor’s own site. These pages are public, so they’re green; paste freely. Note the page’s name and today’s date for the form.

THE PROMPT · COPY EVERYTHING IN THE BOX

> Below is text from an AI tool's own privacy, terms, or plan page. I run a small company and I'm deciding whether to approve this tool for work. Answer four questions from this text only. One: where does my data go (what is kept, where, for how long, and how it is deleted)? Two: who can train on it (is my content used to train models on this plan, by default or at all)? Three: who checked this company (any outside audit or report named, such as a SOC 2, and what it says it covers)? Four: what happens when it fails (can I export my data, close the account, and remove a user, and what does the text promise when something goes wrong)? For each question, quote the exact lines that answer it, then restate the answer in one plain sentence at an eighth-grade level. Where the text does not answer a question, write GAP in capital letters and say what is missing; do not fill the gap from general knowledge about this company or any other. If the text limits an answer to certain plans, say which plans. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> Text: **[PASTE THE VENDOR'S PAGE]**

GOOD OUTPUT four answers, each with the quoted lines first and the plain English second, and GAP anywhere the page went quiet. A GAP is a finding, not a failure.

BEFORE YOU USE IT quotes go onto T-8 only after you find them on the live page yourself; the form cites the page, not the chat. A GAP means ask the vendor in writing or don't approve. Pages change the week after you read them, so date everything.

PP-7.2

Seat Planner

USE WHEN you're deciding who gets a paid seat and the fair-sounding answer, everybody, is about to cost real money.

HAVE READY a plain list of roles, not names: what each role sends out of the building in a normal week, and whether it comes with a company email address. Roles only, nothing about customers, so it's green.

THE PROMPT · COPY EVERYTHING IN THE BOX

I run a small company and I'm buying a business AI plan. Help me decide who needs a paid seat. My roles are listed below, with what each one writes or sends out of the building in a normal week and whether that role has a company email address. Do not draft anything yet; first ask me, one question at a time, anything you need to know about a role. Then give me three lists. Seats: roles whose work sends words or numbers outside the company, with one line each on what the seat is for. No seat: roles that don't, or that use AI only for general questions with nothing from a real job in them, with one line each on why not and what that role can still do without one. Decide later: roles to watch for a quarter, with what would move each one up. Treat a role that refuses to use AI as a no-seat role without argument. After the lists, write a checklist of every account action to take on the day any seat holder leaves. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

My roles: **[LIST EACH ROLE, WHAT IT SENDS OUT, COMPANY EMAIL YES OR NO]**

GOOD OUTPUT three short lists with reasons, a day-they-leave checklist, and at least one role in the no-seat column. If every role got a seat, run it again and say money is tight.

BEFORE YOU USE IT the lists are a draft of your judgment, not a replacement for it. You know which roles are about to change; the tool doesn't. The day-they-leave checklist goes on the back of T-8, checked against each vendor's own offboarding steps.

PP-7.3

Settings Walk Script

USE WHEN accounts are set up, or you've inherited a pile of personal ones, and you want a settings walkthrough that doesn't depend on this book naming buttons that moved last month.

HAVE READY the list of tools and plan names your people use for work. That list is green. Never paste logins or passwords into anything, for any reason.

THE PROMPT · COPY EVERYTHING IN THE BOX

Write me a settings checklist I can use on any AI tool my company uses, phrased as things to find and confirm, not as named menus or buttons, since those change and differ by tool. Cover, in this order: which account the tool is signed into, and how to tell a company account from a personal one; where to find whether my content is used to train models, what that kind of setting is usually called, and what position it should be in; what the plan keeps, for how long, and how a person deletes a conversation; who the administrator is and what the admin can see and remove; and how to remove a person's access entirely. For each item, give me the goal in one plain sentence, two or three places that kind of setting usually lives, and what to write down as proof I checked it, with the date. Keep the whole thing at an eighth-grade level and short enough to run in ten minutes per tool. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Our tools and plans: **[LIST THEM]**

GOOD OUTPUT a one-page walkthrough in find-and-confirm language, nothing vendor-specific, with a write-this-down line for each item. It should read the same for a tool that launches next year.

BEFORE YOU USE IT the vendor's own help pages outrank the walkthrough wherever they disagree. If a training setting can't be found at all on some plan, treat that as a GAP on T-8, not as good news.

Chapter 8. Do I Really Need to Keep a Log?

PP-8.1

Log-Line Writer

USE WHEN something AI helped write just went out and you want the log line written before the phone rings and you forget.

HAVE READY one plain sentence about what just went out. Scrub it first: job number or "Customer A," never a name or address. That sentence is yellow, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

Turn my note below into one line for my company's AI usage log. The log has five fields, in this order: date, who sent it, which AI tool helped, what went out and where it went, and who checked it before it left. Write one line with the five fields separated by the | character, under twenty-five words total. Use only what my note says. No customer names or addresses; if my note includes one, replace it with the job number if given, or "Customer A." If my note doesn't give the date, write [DATE]. If my note doesn't say who checked it, write UNCHECKED in the last field; do not guess a name, because an unchecked send is exactly what this log exists to catch. If the last field came out UNCHECKED, add one sentence after the line telling me to check the item against its source before anything else goes out. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

My note: **[ONE SENTENCE ABOUT WHAT JUST WENT OUT]**

GOOD OUTPUT one pipe-separated line you can paste straight into T-5, and nothing else unless the checked-by field came back UNCHECKED.

BEFORE YOU USE IT UNCHECKED in the output is a stop sign, not a word to file. Fill the field with a real name only after a real person checked the real thing. The line goes in your log; the tool keeps no copy that counts.

PP-8.2

Quarter-Log Reader

USE WHEN a quarter of log lines is sitting in T-5 and the quarterly review is coming, and you want the patterns pulled out before the meeting instead of during it.

HAVE READY the quarter's log lines, scrubbed (job numbers, no names), your approved tool list from the one page, and last quarter's summary if you have one. Log lines are working data, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below are one quarter of entries from my company's AI usage log. Each line has five fields: date, who, tool, what went out and where, who checked it. Read all of them and give me five short lists. One: what we used AI for most, grouped by kind of output, with rough counts. Two: every entry where the checked-by field is blank, says UNCHECKED, or names the same person as the who field. Three: every tool named in the log that is not on my approved list, pasted below. Four: anything that appears for the first time this quarter, or that appeared in my last quarter's summary and has stopped. Five: three plain questions these entries should put on my quarterly review agenda. Use only what the log says. Do not guess what a vague entry means; put it in a sixth list titled "Entries too vague to read," because a line nobody can read a quarter later needs rewriting, not interpreting. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

My approved list: **[PASTE IT]**
Last quarter's summary: **[PASTE IT, OR WRITE NONE]**
The quarter's log lines: **[PASTE THEM]**

GOOD OUTPUT six short lists, counts and names from your own lines, and no congratulations. List two and list three are your Friday questions, answered for a whole season at once.

BEFORE YOU USE IT bring the lists to the review and let the meeting decide what they mean. A quiet log can mean good habits or a dead log, and the tool can't tell which, so ask the crew which it was. Pull three entries yourself and match them to the real documents before you trust the summary.

Chapter 9. How Do I Roll This Out Without a Fight?

PP-9.1

Toolbox Talk Personalizer

USE WHEN T-10's blanks are filled in but the script still sounds like a book instead of like you talking to your crew.

HAVE READY your filled-in T-10, scrubbed of real names except the ask-first person; one sentence about your trade and crew; and the top three AI uses from your survey, summarized with no names.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below is the script for a fifteen-minute talk I'm giving my crew about our company's new AI rules, plus a sentence about who we are and the top three ways our people already use AI. Rewrite the script so it sounds like an owner in my trade talking to his own crew before the trucks roll: spoken sentences, everyday words, sixth-grade reading level, examples swapped for ones from our kind of work. Three strict rules. One: every rule, name, number, and condition in my script survives with the same meaning; change the words, never the requirement. Two: the sentence "Nobody gets in trouble for telling." stays exactly as written, untouched. Three: keep the part structure and the minute marks so the talk still fits in fifteen minutes. Do not add rules I didn't give you, and do not add statistics, news stories, or anything about other companies. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

About us: **[ONE SENTENCE: TRADE, SIZE, OFFICE AND FIELD]**
Our top three uses: **[FROM THE SURVEY, NO NAMES]**
My script: **[PASTE YOUR FILLED-IN T-10]**

GOOD OUTPUT the same talk in your trade's vocabulary, same parts, same minute marks, with the amnesty line untouched. If it added a statistic or a story you didn't give it, cut that before anything else.

BEFORE YOU USE IT read it out loud once, standing up, with a timer. Anything you stumble on, rewrite in your own words. The script is a floor, not a ceiling; the version your crew remembers is the one that sounds like you.

PP-9.2

Pushback Rehearsal

USE WHEN the talk is tomorrow and you want to hear the hard questions tonight, from something that can't gossip.

HAVE READY your one page, scrubbed of real names except the ask-first person, and ten quiet minutes per character.

THE PROMPT · COPY EVERYTHING IN THE BOX

I'm an owner rolling out the AI rules below to my crew tomorrow, and I want to rehearse the pushback. Play one employee at a time, and stay in character until I say "break." Start with whichever I name: the skeptic, who doesn't use AI, is proud of it, and wants to know why these rules apply to them at all; the power user, who uses AI constantly, is good at their job, and is sure these rules will slow them down; or the worried one, who thinks these rules are the first step toward replacing them. Push back on my answers the way a real employee would, twice, before accepting anything, and don't accept an answer that dodges the question. When I say "break," step out of character and tell me plainly: which of my answers would land in a real shop, which sounded like management talk, and the one question this character had that I never actually answered. Do not rewrite my rules and do not invent new objections outside your character's point of view. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

My rules: **[PASTE YOUR SCRUBBED ONE PAGE]**
Start as: **[THE SKEPTIC / THE POWER USER / THE WORRIED ONE]**

GOOD OUTPUT an employee who argues back and doesn't fold on the first answer, then an honest debrief with one question you ducked. If it caves immediately, tell it to push harder and run it again.

BEFORE YOU USE IT the rehearsal sharpens your answers; it doesn't predict your people. Your real Bev will ask something no tool thought of, and the right move in the room is the same one as in Part 6: write it down and answer by Friday.

PP-9.3

New-Hire Page Packet

USE WHEN the rollout is done and you're building the packet that covers everyone you hire from here on.

HAVE READY your one page, scrubbed of real names except the ask-first person, and one sentence about the company for the welcome line.

THE PROMPT · COPY EVERYTHING IN THE BOX

> Turn my company's one-page AI rules, pasted below, into a first-day packet for a new hire. Three parts, two pages at most. Part one: a short welcome, five sentences or fewer, saying these are the company's AI rules, everyone here signed them including the owner, and who to ask with questions. Part two: my one page, word for word, unchanged. Part three: five questions a brand-new hire would ask in their first week, each answered in two plain sentences using only what my page says, at a sixth-grade reading level. Where my page doesn't answer one of the five, write [DECIDE] with a one-line note telling me what to settle, instead of inventing an answer. End the packet with one line for their signature and the date, and a note that someone will read the page out loud with them before their first job. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> About the company: **[ONE SENTENCE]**
> My one page: **[PASTE IT]**

GOOD OUTPUT a packet where part two is your page untouched and the five questions sound like a nervous first-weeker, with [DECIDE] anywhere your page went quiet. A [DECIDE] is homework for you, not a flaw in the packet.

BEFORE YOU USE IT check part two against your real page character by character; the packet dies the day it disagrees with the wall copy. The read-aloud with a real person still happens. The packet is the paper half of a conversation, not a replacement for it.

Chapter 10. What Do We Do When Something Goes Wrong?

PP-10.1

Incident Write-Up Builder

USE WHEN the first hour is over, the facts are in hand, and the four-paragraph write-up needs to exist before memory starts editing it.

HAVE READY your bullet notes on what happened, what you found, what you fixed, and what changed. Scrub them first: job number or “Customer A,” never a name or address. Incident notes are yellow, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

Turn my notes below into my company's AI incident report: four short paragraphs under these exact headings, in this order: What happened. What we found. What we fixed. What changed. Plain words at an eighth-grade reading level, facts and dates only, no adjectives about how seriously we take things, one page at most. Use only what my notes say. Where my notes don't answer one of the four headings, write [UNKNOWN] under that heading instead of filling the gap, because a guess in an incident report is a second incident. After the four paragraphs, add a line titled "Attach as proof" listing only the evidence my notes mention. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

My notes: **[PASTE YOUR SCRUBBED BULLET NOTES]**

GOOD OUTPUT four paragraphs that read like T-6, a proof line built from your own notes, and [UNKNOWN] anywhere your notes went quiet. Every [UNKNOWN] is an assignment, not a blank to live with.

BEFORE YOU USE IT read the draft against the folder of saved evidence, line by line. The owner signs only after a person has resolved every [UNKNOWN] and every [CHECK], and the signature goes on the paper version, not in the chat.

PP-10.2

Make-It-Right Letter

USE WHEN a customer got the wrong thing, the phone call is done or about to happen, and the written follow-up has to own the mistake without creating a second one.

HAVE READY the verified facts: what went out, the correct version with its source, and what you changed. Scrub them: job number or "Customer A," no addresses. Company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

Draft a short letter from my company to one customer about a mistake our AI-assisted process made. Use only the facts below. The letter does three jobs in this order: say plainly what went wrong and that it was our mistake, give the correct information, and say what we changed so it won't happen again. Write it the way a business owner talks, not the way a press release talks. No excuses, no blaming the software, no legal language, and no promise, discount, or offer beyond what my facts state. After the letter, add a list titled "A lawyer should read these first," quoting every sentence from the letter that concedes money, admits fault beyond the stated mistake, or makes any new commitment; if no sentence qualifies, say so in one line. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

The facts: **[WHAT WENT OUT · THE CORRECT VERSION AND ITS SOURCE · WHAT WE CHANGED, AND WHEN]**

GOOD OUTPUT a letter under a page that sounds like a person, plus the lawyer list. An empty lawyer list is a claim, not a clearance, so read the letter once yourself hunting for the same three things.

BEFORE YOU USE IT this letter is outbound work with promises in it, so it gets the full treatment: the four triggers, a checker who isn't the writer, and a line in the log. The quoted sentences go to a real lawyer whenever money or fault is on the table.

PP-10.3

Cause Finder

USE WHEN the symptom is handled, and before the report closes you want the cause on paper, not just the story.

HAVE READY the facts from your T-6, scrubbed: job number or "Customer A," no names. Company account only, and ten quiet minutes.

THE PROMPT · COPY EVERYTHING IN THE BOX

> Below is what happened in an AI-related mistake at my company. Interview me to find the cause. Ask one "why" at a time, at most five, each one about my answer to the last, and stop early when a why lands on a process, a setting, or an ownership gap instead of a person. Do not accept "someone wasn't careful" or any version of it as a cause; when I offer one, ask what would have caught the mistake even on a careless day. When the whys are done, give me three labeled items: the symptom fix (what handled this one case), the cause fix (the change to a process, setting, or owner that keeps the same mistake from repeating), and the thirty-day check (one specific thing to look at in thirty days to confirm the cause fix held). Build all three only from what I told you. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> What happened: **[PASTE THE SCRUBBBED FACTS FROM T-6]**

GOOD OUTPUT a short interview, then three labeled items, and a cause that is not a person's name. If the cause it lands on is a person, push back once; a process that only works when everyone is perfect is the actual answer.

BEFORE YOU USE IT the decisions are yours. The cause fix goes into paragraph four of T-6, and the thirty-day check goes on the calendar the same day, because a check with no date joins the someday list, and the someday list is how this incident happened.

Chapter 11. What Do I Tell Customers, Contractors, and My Insurer?

PP-11.1

Questionnaire Answerer

USE WHEN a customer, builder, or insurer sends written AI questions and you want drafted answers that stay inside the truth.

HAVE READY their questions and your one page (T-1), plus your approved tools list. Scrub both: swap people's names for roles and the customer's name for "the customer." Use the company account; their form and your rules are yellow once they're together.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below are questions a customer or insurer has asked about my company's AI use, followed by my company's own written AI rules and tool list. Draft a short answer to each question using only what my rules and list say. Where my rules answer the question, restate the rule plainly and point to the line it comes from. Where my rules do not answer the question, write [GAP] with one line naming what's missing, instead of drafting something agreeable, because an answer my company can't back up is worse than a gap. Keep every answer brief and factual, make no promise my rules don't make, and never claim we do not use AI unless my rules say exactly that. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Their questions: **[PASTE THE QUESTIONS]**
My rules and tool list: **[PASTE THE SCRUBBED PAGE AND LIST]**

GOOD OUTPUT one short answer per question, each traceable to a line on your page, with [GAP] wherever your rules went quiet. A set of answers with no gaps and no checks deserves a suspicious second read.

BEFORE YOU USE IT every [GAP] is a chapter assignment before it's an answer. The owner reads the final set against the page, dates it, and keeps a copy with the statement, because the next form will ask whether anything changed.

PP-11.2

Clause Explainer

USE WHEN a contract in front of you mentions AI, confidentiality, or your data, and you want plain English before you sign.

HAVE READY the clause text, and a stop first. A customer's contract is red on the card unless its owner says yes in writing, so without that yes, retype the clause's requirements in your own words instead of pasting. Read the contract's confidentiality terms either way, strip every name and project detail, and use the company account.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below is a clause from a contract my company is being asked to sign, or my own plain-words retelling of one. Start your answer by stating that this is not legal advice. Then explain the clause at an eighth-grade level: what it requires my company to do, what it forbids, which words are doing the most work and why, and what could happen to my company if we sign it and then slip. Then give me two short lists: the questions I should ask a lawyer before signing, and the questions I should ask the customer who sent it. Do not tell me whether to sign and do not propose edits to the clause. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

The clause: **[PASTE OR RETELL THE SCRUBBED CLAUSE]**

GOOD OUTPUT a not-legal-advice line up top, a plain reading, the load-bearing words named, and two question lists. If it tells you to sign or not to sign, it overstepped; ignore that line and keep the questions.

BEFORE YOU USE IT a real lawyer reads the real clause whenever real money or a long commitment rides on it, and your retelling never substitutes for the contract itself. The plain version is only for your understanding, because the contract's own words are the ones you'd be held to.

PP-11.3

Customer Statement Fitter

USE WHEN your five-sentence statement (T-7) is true but sounds like a form, and you want it in your trade's own words.

HAVE READY your filled-in T-7 and one line about your company: trade, size, who you serve. Scrub names to roles. Green once scrubbed, but the company account is still the habit.

THE PROMPT · COPY EVERYTHING IN THE BOX

> Below is my company's five-sentence statement about how we use AI, plus one line about what we do. Rewrite the statement so it sounds like my trade and my voice: plain words, an eighth-grade reading level, no marketing language, and still exactly five sentences in the same order. The hard rule: do not change what any sentence claims. Every fact, limit, and commitment must survive with the same meaning, and if a sentence would sound better making a bigger promise, leave the promise alone. After the rewrite, show each new sentence beside the original so I can confirm the meaning held. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> About us: **[ONE LINE]**
> My statement: **[PASTE YOUR FILLED-IN T-7]**

GOOD OUTPUT five sentences that sound like a person in your shop, side by side with the originals, and no claim that grew in transit.

BEFORE YOU USE IT read the new version out loud. Any sentence whose meaning drifted goes back the way it was, and the subtraction test still applies: true, or out.

Chapter 12. How Do I Keep the Rules From Going Stale?

PP-12.1

Quarterly Review Runner

USE WHEN the quarterly review is on the calendar and you want something to keep the meeting on the seven questions, take the notes, and draft the change note at the end.

HAVE READY your one page with its version number, your prep notes from T-9 (log patterns, incidents, settings findings, dated answers), and thirty minutes. Scrub everything first: job numbers or "Customer A," roles instead of names except the person who runs the review. Review notes are working data, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

I'm running my company's quarterly review of our AI rules, and I want you to chair it. Below are our one-page rules with their version number and my prep notes. Ask me these seven questions one at a time, in this order, and wait for my answer before moving on: What's new? What went wrong? Are the checks still happening? What changed outside, in contracts, customer forms, our insurer, or the law, and is everything we told somebody in writing still true? What should we add? What should we stop? What do we rewrite? After each answer, ask at most one follow-up, and only if my answer left a fact unclear. Do not suggest answers, and do not decide anything for me. When all seven are done, give me three things: short notes for each question in my own words; a list of every decision with an owner and a date, writing [OWNER?] or [DATE?] where I didn't give one; and, only if question seven changed a line, a draft change note with the new version number, the old line, the new line, and one sentence on why. If nothing changed, say so in one line instead of inventing a change. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Our one page: **[PASTE IT, WITH ITS VERSION NUMBER]**
My prep notes: **[PASTE YOUR SCRUBBED T-9 PREP NOTES]**

GOOD OUTPUT seven questions asked one at a time, then notes in your words, a decision list with owners and dates (or flags where you skipped them), and a change note only if you actually changed a line. A quiet quarter should come back short.

BEFORE YOU USE IT the notes go onto T-9 and get filed; the chat is not the record. Any change note gets read out at the huddle by a person, old copies come down, and one superseded copy goes in the drawer. Every [OWNER?] and [DATE?] gets a real answer before the review is signed.

PP-12.2

Update Spotter

USE WHEN a software vendor sends release notes or an update notice, and you want to know whether it slipped an AI feature into something you already pay for.

HAVE READY the vendor's release notes or update email, and your one page with its approved list. Release notes are the vendor's public text, so they're green. Scrub the page of names except the person who owns it.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below are release notes from a software product my company pays for, followed by my company's one-page AI rules and approved tool list. Read the release notes and list every feature that uses AI or automation in any form, including features described as smart, assisted, suggested, generated, summarized, or automatic. For each one, tell me in plain words: what it does; whether the notes say it is on by default, off by default, or don't say; what information it reads or sends, if the notes say; and whether it can send, post, book, or change anything without a person approving it. Then compare each feature to my rules and approved list, and say one of three things: my rules cover it and allow it, my rules cover it and forbid it, or my rules don't address it. Quote the line from my rules you're relying on. Where the release notes are vague about any of this, write UNCLEAR and say what question to ask the vendor, instead of assuming the safe answer. If the notes contain no AI features, say so in one line. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Release notes: **[PASTE THE VENDOR'S NOTES]**
Our rules and approved list: **[PASTE YOUR SCRUBBED ONE PAGE]**

GOOD OUTPUT a short list of features with on-or-off status, what each can do without a person, a verdict against your page with the line quoted, and UNCLEAR wherever the notes went vague. An UNCLEAR is a question for the vendor, not a pass.

BEFORE YOU USE IT the notes describe what the vendor shipped, not what your account is actually doing. Open the settings yourself and confirm each feature's real status. Anything your rules don't address stays off until it's on the approved list, and if it touches a customer's paper, it goes on the agenda for the next review or an early one.

Chapter 13. What Changes When We're Regulated or Audited?

PP-13.1

AI Inventory Interviewer

USE WHEN you're starting the AI inventory (section 11 of T-2, growing into T-12) and don't want to stare at an empty table.

HAVE READY your approved tools list, your survey tally (scrubbed), and the list of software the company pays for. Scrub people's names to roles; keep the real owner names on your own copy and fill them in after the chat. Inventory notes are working data, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

I'm building an inventory of every AI tool and every AI feature my company uses, one row at a time. Interview me: ask about one tool or feature at a time, and for each one ask what it is, what it does, what information goes into it, whether its output helps decide anything about a person's money, home, or job, who owns it, and what checking happens before its output gets used. After each row, ask what else we use, and keep going until I say the list is done, including AI features inside software we pay for, not just standalone tools. Then give me the finished inventory as a table with these columns: tool or feature, what it does, data it touches, decision tool yes or no, owner, risk rating, controls, last reviewed. Rate each row high, medium, or low by what its output touches: a person's money, home, or job is high; internal drafts are low; the rest is medium. Where I didn't give you an owner or a control, write [OWNER?] or [CONTROL?] instead of filling it in yourself. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

GOOD OUTPUT one question at a time, then a table with [OWNER?] and [CONTROL?] wherever you went vague. A finished inventory with no flags on the first pass deserves a second look.

BEFORE YOU USE IT the inventory is done when somebody has opened the settings of every piece of software on it, not when the chat ends. Every [OWNER?] gets a real name before the table goes anywhere near a binder.

PP-13.2

Evidence Gap Finder

USE WHEN you want to know what an examiner or auditor would ask to see that you can't produce yet.

HAVE READY a plain description of what you actually have: your policy, the inventory's status, who checks what, your review cadence, and which records exist. Scrub names to roles and strip customer details; program descriptions are working data, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below is a plain description of my company's AI program as it stands today. Map what we have to these four functions, naming which pieces serve each one: govern, who decides and who answers; map, what we use and where it could hurt someone; measure, how we check; manage, what we do about what we find. Then list what's missing: for each function, name what an outside reviewer would likely ask to see that my description doesn't cover, stated as a document or record in plain words, not as advice. Do not tell me what any law requires, and do not say we comply or fail to comply with anything; write each gap as "no written record of X," never as a violation. Order the gaps by which would be hardest to produce from nothing on short notice. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

My program today: **[PASTE THE SCRUBBED DESCRIPTION]**

GOOD OUTPUT your pieces sorted under the four functions, then a gap list written as missing documents, hardest-to-produce first. If it starts explaining what a law requires, ignore those lines; that job belongs to counsel.

BEFORE YOU USE IT the gap list is a work plan, not a finding. Each gap gets an owner and a date, and anything touching a licensed or examined business unit goes to counsel before you build it.

PP-13.3

Exam Answer Assembler

USE WHEN an examiner, an auditor, or a customer with audit rights has sent a written request list and you're assembling the response.

HAVE READY their request list and a list of the documents and records you actually have, with dates. Scrub both: no customer names, no account details, roles instead of names. A request list from a regulator is sensitive paper, so retype its items in your own words rather than pasting, and use the company account.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below is a list of items an outside reviewer has asked my company to produce, in my own words, followed by a list of the documents and records we actually have. Match them: for each requested item, say which of our documents answers it, partly answers it, or does not exist. Then draft a short cover narrative, one paragraph per requested item, that describes only what we are providing, in plain factual language, with no claims about compliance, no grading language about our own program, and nothing we do not have. Where an item has no document, the narrative says so plainly and states what we are doing about it, using only what I have told you; do not invent a plan to fix it. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

Their request, in my words: **[RETYPE THE LIST]**
What we have: **[PASTE THE SCRUBBED DOCUMENT LIST]**

GOOD OUTPUT a three-column match (requested, what answers it, status), then a cover narrative that reads like an index, not a defense. If the narrative grades your own program, cut those lines.

BEFORE YOU USE IT nothing goes out on this draft alone. Counsel reads any response to a regulator before it is sent, every listed document gets pulled and read against its description, and a gap named in the narrative has to match what you are actually doing about it.

Chapter 14. What About the AI Already Inside Our Software?

PP-14.1

Automation Register Interviewer

USE WHEN you're starting the automation register (T-12) and would rather answer questions than stare at a blank form.

HAVE READY your approved tools list or inventory (scrubbed), and the admin settings open as you go. Roles instead of names; the register describes what your software can do, which is working data, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

I'm building a register of every automation in my company's software: anything that can book, cancel, send, order, pay, or change a record without a person pressing the button. Interview me about one automation at a time. For each one, ask: what it is and whose software it lives in; which of those actions it can take on its own; which systems it can touch, and whether it can only read them or also change them; whether it reads email, texts, calls, web pages, or messages from people outside the company; what limits are set on it, such as a dollar cap, hours, job types, or a daily count; which actions wait for a person's yes, and whose; who owns it; where its off switch is and when it was last tested; and where its actions are logged and who reads the log. After each one, ask what else our software can do on its own, and keep going until I say the register is done, including features inside software we pay for, not just tools we chose. Then give me the finished register with one numbered entry per automation covering all nine answers. Where I couldn't answer from the settings, write [SETTINGS?] instead of guessing, and where no limit or owner exists, write [LIMIT?] or [OWNER?] rather than inventing one. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

GOOD OUTPUT one automation at a time, then numbered entries with [SETTINGS?], [LIMIT?], and [OWNER?] wherever your answers went thin. A first register with no flags usually means somebody answered from memory, so open the settings and go again.

BEFORE YOU USE IT the register is done when the settings confirm every answer, not when the chat ends. Every flag gets a real answer, and any automation that fails the approval rule on T-12's back gets its permissions trimmed, or a written exception, before the register is filed.

PP-14.2

Leash Auditor

USE WHEN one agent or AI feature is about to go live, or already is, and you want its job cut to the smallest size that still does the work.

HAVE READY a plain description of the feature, what you want it for, and whatever the settings show it can do. Scrub names to roles and customers to "the customer"; feature descriptions are working data, so company account only.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below is a description of one AI feature or agent my company uses or is about to turn on, and what we want it for. Help me put it on the shortest leash that still does the job. Give me five things. First, the smallest version of the job, in one sentence: what it should do and nothing more. Second, a list of every permission or capability in my description that the smallest job doesn't need, each phrased as something to switch off or ask the vendor to switch off. Third, the approval points: for each action it can still take, say whether it should wait for a person first, applying this rule: a person says yes before software sends anything outside the company, spends or refunds money, promises a time or a price, touches safety, or does anything that can't be undone. Fourth, a test plan to run before it goes live or keeps running: at least five realistic trial runs, including one where the incoming request is wrong and one where the request comes from software or a stranger rather than a customer. Fifth, what to check weekly for the first month: which logged actions a person should read, and what result would make us switch it off. Do not assume a setting exists; where you are not sure my software offers a switch or limit, say so and phrase it as a question for the vendor. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

The feature and what we want it for: **[PASTE THE SCRUBBED DESCRIPTION]**

GOOD OUTPUT a one-sentence job, a switch-off list, approval points mapped to the five triggers, a test plan that includes a wrong request, and a first-month watch list. If it tells you the feature is safe as configured, run it again and ask for the switch-off list first.

BEFORE YOU USE IT the settings decide what's real. A person opens them, makes each change, and writes the result on the automation's T-12 entry, including the off-switch test with its date.

PP-14.3

Agent Incident Reconstructor

USE WHEN software acted on its own, yours or someone else's, and you need the who-confirmed-what timeline before anyone argues about it.

HAVE READY the messages, confirmations, and log entries from both systems, in order where you know it. Scrub hard before pasting: companies become "our company" and "their company," people become roles, customers come out entirely, and no account numbers. Messages between two companies can carry both companies' confidential information, so retype rather than paste where a contract requires it, and use the company account.

THE PROMPT · COPY EVERYTHING IN THE BOX

Below are the messages, confirmations, and log entries from an incident where software took an action on its own: ours, another company's, or both. Build me the timeline. List every step in order with four things per line: the time if known, which system or person acted, what it said or did in plain words, and what, if anything, that step committed anyone to. Then mark the first point in the timeline where a person could have stopped it, and every later point where a person could have caught it. Then list the records each side should pull to confirm the timeline, stated as documents, such as message logs, schedule entries, or settings screenshots with dates. Do not say who is at fault, do not say who owes whom money, and do not interpret any contract; those answers belong to the two companies and their lawyers. Where the messages leave a gap in the sequence, write [GAP] and say what record would fill it. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

The messages and logs, scrubbed: **[PASTE OR RETYPE THEM]**

GOOD OUTPUT a plain timeline with the commitments called out, the stop points marked, a pull list of records, and [GAP] flags where the sequence went dark. If it assigns blame or reads the contract, strike those lines; the timeline is the deliverable.

BEFORE YOU USE IT the timeline goes into the incident report (T-6), and a person checks every line against the real logs before anyone outside the company sees it. If the incident touched another company's work, Chapter 10's rule applies: report it to them before they find it.

Universal: Prompts That Work Anywhere

PP-U.1

Ask It How to Help

USE WHEN you have a job for an AI tool that's bigger than one message, and you don't know the best way to ask for it.

HAVE READY one or two plain sentences about what you want done and who it's for, with nothing from a real job in them. That much is green, so any tool is fine. The tool will ask you questions; give each answer a color on the card before you type it, and if any answer is yellow, move to the company account.

THE PROMPT · COPY EVERYTHING IN THE BOX

I want help with the job described below. Do not start the work yet. First, tell me in five steps or fewer how you would go about it, and what you would need from me at each step. Then ask me the questions you need answered, one at a time, and wait for each answer before you ask the next. Ask only what would change the result. If an answer I give you includes a code, a password, an account number, or a customer's name together with an address or phone number, stop and tell me to take it out and answer again without it. When your questions are done, tell me in one sentence what you are about to make, and wait for me to say go. Then make it. Where my answers left a gap, write [DECIDE] with a one-line note instead of choosing for me. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

The job: **[ONE OR TWO SENTENCES: WHAT YOU WANT DONE, AND WHO IT'S FOR]**

GOOD OUTPUT a short plan, then questions one at a time, then one sentence saying what it will make, and a pause for your go. If it starts drafting before it asks you anything, open a new chat and paste the prompt again.

BEFORE YOU USE IT the plan is the tool's guess at how your job goes, and you know your company better than it does. Change any step that doesn't fit before you answer the first question, because now and then a sensible-looking plan includes a step your contract or your page forbids. What it makes at the end is a draft like any other: if it leaves the building, it gets the four triggers, a checker, and a line in the log.

PP-U.2

The Self-Audit

USE WHEN an AI answer came from anywhere outside this pack, a chat window, a phone app, or a feature inside your software, and you want to know what to check before you use it.

HAVE READY the answer, and the question that produced it if you have it. Scrub both the way the card says: red comes out by hand, and if anything about a customer is still in it, it's yellow, so company account only. Run it in a fresh chat, not the one that wrote the answer.

THE PROMPT · COPY EVERYTHING IN THE BOX

> Below is an answer an AI tool gave me, and the question that produced it if I have it. Do not improve the answer, do not grade it, and do not tell me whether it looks right. Read it as a stranger who has to act on it tomorrow, and pull out every number, price, date, name, rule, claim about a code or regulation, safety step, and promise in it. For each one, quote the exact words and name the real-world place a person should check it, such as a price book, a manual, a contract, an official website, or the person allowed to decide it. Put anything that touches safety, money, or a promise to a customer at the top of the list. If the answer names a source, list that source as something to open and read, not as proof. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.
>
> The question, if I have it: **[PASTE IT, OR WRITE NONE]**
> The answer: **[PASTE THE SCRUBBED ANSWER]**

GOOD OUTPUT every claim quoted with a place to check it, safety and money first, ending in the "Check before you use this" list. A short answer can earn a short list. A list with nothing on it means the tool skipped the job, so run it again.

BEFORE YOU USE IT this card is the pack's closing paragraph working on its own, and the list it hands you is where checking starts. Asking any tool whether the claims are right only gets you a second guess, so a person holds each line against its source. If the answer touches a safety question, the rule from your one page settles it: manufacturer documentation or a human, full stop.

PP-U.3

Explain It to My Crew

USE WHEN you need to say a rule, a page section, or a decision out loud at a huddle, and the written version sounds like paperwork.

HAVE READY the rule, section, or decision, scrubbed of names except the person to ask, and one sentence about your crew. A rule with nothing from a real job in it is green.

THE PROMPT · COPY EVERYTHING IN THE BOX

Turn what I paste below into something I can say out loud to my crew in about two minutes: under 300 words, at a sixth-grade reading level, in short spoken sentences. Use this order: what the rule or decision is; why we have it, with one example from our kind of work; exactly what each person does differently starting today; and who to ask. Every requirement, name, number, date, and condition in what I paste must survive with the same meaning; change the words, never the rule. Do not add rules, and do not add statistics or stories about other companies. If what I paste contains the sentence "Nobody gets in trouble for telling." keep it word for word. If any information you need is missing, ask me for it instead of guessing. Do not invent numbers, prices, code requirements, names, or policies; where something must be confirmed, write [CHECK] next to it. End your answer with a short list titled "Check before you use this," naming every fact, figure, and promise a person must verify, and where to verify it.

About my crew: **[ONE SENTENCE: TRADE, SIZE, OFFICE AND FIELD]**
What to explain: **[PASTE THE RULE, SECTION, OR DECISION]**

GOOD OUTPUT about two minutes of talk that sounds like you at a huddle, in four parts (the rule, the why, what changes, who to ask), with nothing in it your paper didn't say.

BEFORE YOU USE IT read it out loud once with a timer. Then hold it next to the paper, and put back any line where the meaning moved, because your crew will follow what you said, not what the page says.

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