



Using AI to Improve Profits and Efficiencies in Your Small Business

AI Essentials for Business Workshop Series Handout



AI Prompt Reference Sheet

Your Quick-Reference Guide for Smarter AI Results

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The Basic Prompt Formula

Every strong prompt answers three questions before the AI starts working.

Context	What's the situation? Who's involved, and why does this matter right now?
Task	What exactly do you want the AI to do? Name the deliverable.
Constraints	What are the rules — length, tone, format, what to avoid?

Template

Context: [the situation and background]
Task: [exactly what you want]
Constraints: [length, tone, format, what to avoid]

The 30-Second Rule

The extra 30 seconds you spend writing a real prompt saves 10 minutes of editing a weak response. Every time.

The Three Foundations

1. Clarity

- Be specific — vague requests produce vague results
- Name the exact output format: email, bullet summary, numbered steps, social post
- One goal per prompt — multiple goals dilute the output

2. Context

- Give the AI the background it needs to write for your business, not a generic one
- Include company size, industry, client relationship, and the reason for the request

3. Specificity

- Include a word count — “under 150 words” is a constraint, not a suggestion
- Define the tone: professional, casual, urgent, reassuring, direct
- State the format: bullet points, numbered steps, table, email with subject line

Prompt Examples by Business Task

Example 1 — Responding to a Difficult Customer Email

WEAK PROMPT <i>“Write an email to a customer about a delay”</i>	STRONG PROMPT Context: Metro Plumbing Supply, a commercial plumbing distributor. A loyal 5-year customer’s fixture order is delayed and they’re asking for a status update. Task: Draft a reply acknowledging the delay honestly and giving a realistic next step. Constraints: Under 150 words, warm but direct, no corporate jargon.
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Example 2 — Writing a Job Posting

WEAK PROMPT <i>“Write a job posting for a technician”</i>	STRONG PROMPT Context: An 8-person landscaping company struggling to find a reliable crew lead. Task: Write a 250-word job posting for a Crew Lead position. Constraints: Conversational, not corporate. Mention a \$500 signing bonus and a company truck. Avoid jargon like “fast-paced environment.”
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Example 3 — Social Media Post

WEAK PROMPT <i>“Create a Facebook post about our sale”</i>	STRONG PROMPT Context: A family-owned garden center running a spring perennial sale, 30% off March 15–20, targeting homeowners who garden as a hobby. Task: Write a Facebook post announcing the sale. Constraints: Under 100 words, warm and enthusiastic without sounding promotional, include a call to visit this weekend.
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Example 4 — Responding to a Negative Review

WEAK PROMPT <i>“Write a response to a bad review”</i>	STRONG PROMPT Context: Green Valley Landscaping, family-owned, 12 years in business. A 1-star review mentions late arrival, poor edging, and a rude phone call. Task: Write a reply that addresses each issue and offers to return and fix the work at no charge. Constraints: Under 100 words, sincere, never defensive.
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Example 5 — Announcing a Delay to a Client

WEAK PROMPT <i>“Write an email to a client about a problem”</i>	STRONG PROMPT Context: A commercial construction client’s material delivery is delayed 3 days due to a supplier issue, not our error. Task: Write an email acknowledging the impact and proposing a brief call to discuss options. Constraints: Under 150 words, professional.
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Example 6 — Summarizing Meeting Notes Into Action Items

WEAK PROMPT <i>“Summarize these meeting notes”</i>	STRONG PROMPT Context: Rough notes from a 45-minute team meeting. Task: Convert into a 3-sentence summary, a numbered action item list with owner and due date, and any open questions. Constraints: Formatted so it can be pasted directly into a follow-up email. [PASTE NOTES]
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Advanced Techniques

Give the AI a role

A role shapes vocabulary, depth, and tone. An OSHA consultant with 20 years in construction explains fall protection differently than a government website.

ROLE EXAMPLE You are an OSHA compliance consultant with 20 years of experience in commercial construction. Explain the new fall protection regulations to a contractor who has never dealt with OSHA before. Use everyday language and concrete examples.
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Name your reader

The same information reads completely differently for a warehouse crew than for a board of directors.

AUDIENCE EXAMPLE

Write step-by-step instructions for our new inventory system for warehouse employees, ages 25–60, with varying computer experience. Some team members primarily use smartphones. Numbered steps, short sentences, plain language, no tech jargon.

Iterate — refine, don't restart

The first draft is a starting point. Keep the same chat going and refine with specific feedback — each round takes under 30 seconds.

THREE PROMPTS, UNDER TWO MINUTES

Prompt 1: Write a LinkedIn post announcing we're hiring a Project Manager.

Prompt 2: Make it more conversational. Add that we need commercial construction experience and offer flexible schedules with no weekend work.

Prompt 3: Good. Cut it to 150 words and add a placeholder for the application link.

Which Tool for Which Task

All three are free to start. Use this as your shorthand.

TASK	BEST TOOL
Write or brainstorm something from scratch	ChatGPT
Draft job postings, social posts, quick emails	ChatGPT
Build or edit a real Word, Excel, or PowerPoint file	Claude
Analyze a long document	Claude
Plain-language summaries of dense material	Claude
Answer questions using only your own documents	NotebookLM
Research with cited sources	NotebookLM
Turn documents into a podcast-style overview	NotebookLM

The shorthand: writing or building a file → Claude. A quick, versatile task → ChatGPT. Questions about your own documents → NotebookLM.

Is Your Prompt Ready?

- Does it explain who you are, or who the AI should be?
- Does it explain who will read the output?
- Does it specify exactly what you need — email, summary, post, steps?
- Does it include the background context that matters?
- Does it specify length, tone, or format?

Answered no to two or more? Add detail before you send.

Safe Data — the Short Version

Never input Social Security numbers, tax IDs, credit card or bank numbers, medical records, trade secrets, or customer databases into free public AI tools. Anonymize first — replace real names with placeholders and real figures with round numbers. See the full Safe Data Checklist handout for the complete list.

The CRAFT Prompt Framework

The basic formula gets you started. CRAFT takes you further — use it for client-facing work, sensitive communications, or anything you'll reuse.

C	Context	The situation, background, and stakes. What's happening, who's involved, why it matters.
R	Role	Who the AI should be. A persona shapes vocabulary, expertise, and tone automatically.
A	Action	The exact task. Be specific about the output — email, summary, list, guide.
F	Format	How it should look. Word count, paragraphs, bullets, a required subject line.
T	Tone	How it should sound. Professional and warm, direct and urgent, plain language.

What a weak CRAFT prompt looks like

The framework can be technically present and still fail if none of the elements carry real detail.

WEAK CRAFT PROMPT

C – Context: We have a client.
 R – Role: You are a business professional.
 A – Action: Write something for them.
 F – Format: Make it look professional.
 T – Tone: Be friendly.

“We have a client” tells the AI nothing. “Be friendly” could mean anything from a birthday card to a legal notice. CRAFT only works when every element carries real, specific information.

CRAFT Example 1 — Overdue Invoice Follow-Up

A 9-person accounting firm needs a second reminder on an invoice 45 days past due, with a client relationship still in good standing.

C — Context	Henderson & Associates, 9-person accounting firm. Invoice #1142, \$4,800, 45 days past due. First reminder sent 15 days ago with no response. Long-standing client, likely oversight, not a dispute.
R — Role	You are the billing manager. Firm but never confrontational — the relationship matters as much as the payment.
A — Action	Write a second follow-up email referencing the invoice number and amount, noting the first reminder, and asking for a payment date.
F — Format	One paragraph, under 120 words. Invoice number and amount in the first sentence. Specific call to action.
T — Tone	Professional and firm, but warm. No legal language, no threats.

THE ASSEMBLED PROMPT

You are the billing manager at Henderson & Associates, a 9-person professional services firm. Invoice #1142 for \$4,800 is now 45 days past due for a long-standing client. A first reminder was sent 15 days ago with no response. Write a second follow-up email referencing the invoice number and amount in the first sentence, noting the first reminder, and asking the client to reply with a payment date or call with any issue. One paragraph, under 120 words. Tone: professional and firm, but warm — no legal language.

CRAFT Example 2 — Onboarding a New Employee

A 22-person home services company wants a first-week welcome message that sets expectations without sounding like an HR manual.

C — Context	Apex Home Services, 22-person residential HVAC and plumbing company. New technician Marcus starts Monday — experienced, but new to the team.
R — Role	You are the owner. Approachable and direct, not corporate.
A — Action	Write a welcome message covering the first week, what matters most to how the team operates, and who to ask with questions.
F — Format	Three short paragraphs, under 200 words, no bullet points. Sign off as "Dave, Owner."
T — Tone	Warm, direct, human — like a note from a real person, not a policy document.

THE ASSEMBLED PROMPT

You are the owner of Apex Home Services, a 22-person residential HVAC and plumbing company. A new technician named Marcus starts Monday. Write him a welcome message covering what his first week will look like, the two or three things that matter most to how the team operates, and who he should go to with questions. Write it as a real conversation, not a policy document. Three short paragraphs, under 200 words, no bullet points. Sign off as "Dave, Owner." Tone: warm, direct, and human.

CRAFT Example 3 — Explaining a Price Increase

A 14-person landscaping company needs to notify residential clients of an 8% rate increase while retaining as many as possible.

C — Context	Green Ridge Landscaping, 14-person residential company. Fuel, labor, and equipment costs are up. Rates rise 8% next spring. Most clients have been with the company 3+ years.
R — Role	You are the owner — honest, respectful of client budgets, confident in the value delivered.
A — Action	Write a letter announcing the increase, explaining the reason, affirming value, stating the effective date, and giving a contact for questions.
F — Format	Three paragraphs, under 180 words, no bullets. Subject line at top. Phone number placeholder.
T — Tone	Respectful, confident, transparent. Not defensive, not over-apologetic.

THE ASSEMBLED PROMPT

You are the owner of Green Ridge Landscaping, a 14-person residential company serving the same community for over a decade. Costs have risen and rates are increasing by an average of 8% effective next spring. Write a letter to existing clients announcing the increase, explaining the reason honestly, affirming the value they receive, stating the effective date, and giving a contact to discuss their plan. Three paragraphs, under 180 words, no bullets. Include a subject line. End with an invitation to call — use a phone number placeholder. Tone: respectful, confident, transparent. Do not over-apologize.

When to Use Each Framework

- **Basic Formula (Context / Task / Constraints)** — everyday tasks: quick emails, social posts, short summaries. Fast to write, fast to use.
- **CRAFT** — higher-stakes work: client communications, sensitive announcements, employee messages, anything where tone and precision matter.

Legal Disclaimer

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