

Prompt Playbook, sample pages

Five prompts for everyday small-business tasks, and the rule each one teaches. A sample of the playbook Blue Peak builds in the Team AI Workshop, written by Blue Peak. October 2026.

A client's full playbook has about 25 prompts for three roles, each tested on that firm's own tasks. These five are generic on purpose; Copilot, ChatGPT, Claude and Gemini all take them as written.

1. Reply to a customer email

Prompt. "You are helping me, the office manager at a 30-person [insurance agency], reply to a customer. The customer wrote: [paste, with the name and policy number replaced by 'Customer' and 'XXXX']. We can offer [X]. We cannot [Y]. Write a reply under 120 words, warm and direct, no exclamation marks, ending with one clear next step."

Rule: give context and constraints. Who you are, who they are, what is possible, what is not, how long, what tone. Five constraints turn a generic answer into one you can send after a single read.

2. Summarise a long contract, proposal or RFP

Prompt. "Read the attached document. In a table, list every obligation, deadline, fee and termination term, with the page or section where each appears, quoting the exact sentence. Then list separately anything I asked for that you could not find. Do not infer terms that are not in the text."

Rule: ask for the source, every time. A summary with page numbers and quotes can be checked in a minute. The "could not find" list matters as much as the table: a model that cannot say "not found" fills the slot with something invented.

3. Check a quote or an invoice

Prompt. "Here is a quote I am about to send: [line items with quantities, unit prices and totals]. Recompute every line and the total step by step, show your working, flag any line where your result differs from mine, and tell me which lines you could not verify because information is missing."

Rule: make it show the work, then check the numbers yourself. AI does not do arithmetic reliably. It is good at catching a quantity typed twice; the final total is checked in a spreadsheet by the person whose name is on the quote.

4. Turn meeting notes into an action list

Prompt. "These are my notes from today's team meeting: [your own notes, customer names replaced]. Produce a table with columns Action, Owner, Due date, Source line. Only use owners and dates that appear in the notes; where one is missing, write 'not stated' and add it to a list of open questions at the end."

Rule: paste only what is yours, and do not let it guess. Your own notes are safe to share with your approved tool; a client's document may not be. "Not stated" beats a plausible name and a plausible date, which is what you get if guessing is allowed.

5. Draft a procedure, a job posting or a policy section

Prompt. "I want to write a one-page procedure for [how we onboard a new customer]. Before you draft anything, ask me the eight questions you need answered to write it well. After I answer, draft it in numbered steps, plain English, under 400 words, with a line at the top saying who owns it and when it is reviewed."

Rule: questions first, draft second. Asked to write cold, a model fills the gaps with assumptions about your business. Asked to interview you first, it writes from your answers. It is still a draft until the owner has read every line.

The data rule, printed beside every prompt

Never enter Social Security or tax numbers, card or bank numbers, passwords, health information about anyone, payroll or performance records about named people, or anything a customer gave you in confidence. Replace it or leave it out. Use your business account, never a personal one. Check every number, date, name and citation against the source before it leaves the building.

A sample of the playbook format Blue Peak Data Consulting builds for clients. General guidance, not legal advice. Blue Peak Data Consulting LLC, Olathe, Kansas. bluepeakdataconsulting.com, (913) 777-4770.