



Business Context Profile Builder Playbook

Tool Link:

[Use this tool on ChatGPT](#)

What This Tool Is Designed to Do

The **Business Context Profile Builder** is your clarity companion and operational strategist in one. It turns the scattered truths of your business—your culture, offers, tech stack, messaging, team, and more—into a structured, branded profile that's AI-ready and founder-aligned.

It's not just about documentation. It's about distilling the DNA of your business into a living blueprint that drives smarter marketing, aligned messaging, faster onboarding, and confident decision-making across every part of your company.



How to Prepare for This Tool

Before diving in, gather what you can from this list (don't worry if it's not perfect):

- **Business Name + Website** (the tool auto-crawls your site)
- **Product/Service List** (name + brief description)
- **Any existing documents:** pitch deck, org chart, SOPs, brand strategy, team bios, tech tools list
- **Key URLs:** careers page, service pages, about page
- **Mindset shift:** Think "what do I wish my team, tools, and AI already *knew* about my business?"

Bonus: Bring examples of language your brand already uses. This helps ensure everything sounds like *you*.

✅ Best Use Cases

Use this tool when you want to:

- 🧠 **Create a single source of truth** for your business before handing tasks to AI, contractors, or team
 - 🚀 **Launch or refine a new offer** and want every system (sales, content, delivery) aligned
 - 🧑 **Onboard a new hire or partner** and want them to “get it” fast
 - 📁 **Prep for automation or CRM setup** with clarity on tech stack and workflows
 - 🎤 **Pitch or rebrand** with a strong, documented business foundation
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👤 Example Scenario (Fictional)

Monica is a leadership coach preparing to launch her group mastermind. She’s got landing pages, some tech tools, and a lot in her head—but no centralized doc that explains her business clearly.

She opens the Business Context Profile Builder. It asks just two questions:

- ➡ *What’s your business name?*
- ➡ *What’s your website URL?*

From there, it crawls her public pages, drafts each section of her business profile (General Info, Culture, Offers, Tech, etc.), and checks with her as it goes. When a section is unclear—like her sales process—it asks 1–2 smart, specific questions.

In 60 minutes, Monica walks away with a complete Business Context File she can use in her CRM build, content calendar, team onboarding, and AI prompt bank.

🧠 Example Output (Comprehensive)

Here's what Monica receives (partial preview):

BUSINESS CONTEXT FILE

1. GENERAL INFO

- **Business Name:** Bold Path Leadership
- **Website URL:** www.boldpathleadership.com
- **Description:** A leadership development company helping mid-career professionals transition into executive roles with confidence, clarity, and influence.
- **Headquarters:** Remote (based in Austin, TX)
- **Founded:** 2019
- **Legal Structure:** LLC

2. BUSINESS CULTURE

- **Core Attributes:**
 - Bold but grounded
 - Strategically intuitive
- **Mission Statement:** Empowering rising leaders to own their voice and step into their next chapter with integrity.
- **Vision:** A world where leadership is defined by presence, not pressure.

3. PRODUCT / SERVICE MAP

- **Lead Magnet:** 5-Day Clarity Sprint – A free guided journaling experience delivered via email.
- **Mid-Tier:** The Influence Lab – A 6-week group coaching container.
- **Premium:** Executive Path Accelerator – 1:1 coaching for high-level transitions.

Customer Ascension Ranking:

1. Clarity Sprint
2. Influence Lab

3. Executive Path Accelerator

4. TECH STACK

Area	Tool	Purpose
CRM	Dubsado	Intake forms + client tracking
Email Marketing	ConvertKit	Lead nurture + campaigns
Project Management	Notion	Internal SOPs + delivery
Analytics	Google Analytics	Site tracking
Payment Processing	Stripe	Billing and invoices

...and so on through recruiting, partners, milestones, etc.

Tips to Maximize the Tool

- **Start with just your website + offers**—the tool fills in the rest with smart questions.
 - **Bring real examples.** Share exact words your clients use, or language from your sales page.
 - **Use it iteratively.** Block 60–90 minutes or revisit sections in short bursts.
 - **Confirm each section before moving on.** You'll build accuracy with momentum.
 - **Don't skip the culture section.** It's gold for messaging, hiring, and AI prompts.
 - **Treat this as a working document.** Come back and update it as your business evolves.
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