

DAILY BRIEF · PROMPT TEMPLATE

Build your own AI Chief of Staff.

A minimal daily-brief prompt anyone can run inside their LLM — plus optional modules. Paste it into Claude, ChatGPT or Copilot and let the LLM customise it with you.

STRUCTURE	1 core prompt · 5 optional modules
CORE NEEDS	Calendar · Gmail · a task tool
LENGTH	~30 lines core · pick your modules
DELIVERY	Slack DM, Teams, or email
SETUP TIME	An afternoon. Fifteen minutes if you're quick.

How to use this template

Don't fill it in by hand. Paste it into your LLM and let it customise it with you.

Most "daily brief" prompts you see online assume you have a CRM, a sales pipeline, competitors to watch and regions to track. Most people don't. This template is the opposite: **a lean core that works for anyone**, plus small optional modules you can bolt on if — and only if — they match your world.

Everything in **[BRACKETS]** is a placeholder. You *could* fill them in by hand. But the better move is to paste this whole document into your LLM (Claude, ChatGPT, Gemini, Copilot — whichever you use) and let it interview you. In five to ten minutes of back-and-forth you'll have a customised version tuned to how you actually work.

RECOMMENDED PATH — WORK WITH YOUR LLM

- 1 **Paste this entire template into your LLM.**
- 2 Say: *"Here's a daily-brief template. Interview me about my role, my tools, and what I need to see each morning. Then fill in the placeholders and tell me which optional modules apply to my workflow."*
- 3 Answer the LLM's questions. It'll produce a customised version of the prompt, personalised to your stack.
- 4 Paste that customised prompt into a scheduled task in your LLM's app. Run it daily.
- 5 After a week, tell the LLM what's working and what isn't. Let it revise. Repeat — **the tuning IS the value.**

The meta point: you don't just use AI to run your daily brief. You use AI to *build* your daily brief — and to keep improving it as your work changes.

One thing it will not do

The brief only **reads**. It never sends an email, replies to anyone, or commits you to anything — it surfaces and recommends, and you decide. That boundary is deliberate, and it is the difference between a useful assistant and the chatbot in this episode that quoted a customer \$7,000 too much with nobody checking.

The core prompt

Works for anyone with a calendar, email, and a task tool.

Daily Brief – v1 (core)

Operate in [YOUR_TIMEZONE]. The user is [YOUR_NAME], [YOUR_ROLE].

Connectors: Google Calendar, Gmail, [YOUR_TASK_TOOL], Google Drive, web search.

1 • CALENDAR

Pull today's meetings from Google Calendar. For each external meeting, build a 2–3 line prep note from:

- Recent Gmail threads with the attendees.
- Google Drive docs recently shared with them.

If nothing is found, flag "cold – no context."

2 • INBOX (last 24h)

Group Gmail from the last 24 hours into:

- **Action Required** – needs a response or decision today. Sort by urgency. Include a one-line "suggested reply angle" for each.
- **Commitments** – things [YOUR_NAME] promised to do (parse from sent mail). Flag anything due today or overdue.
- **FYI** – notable but no action. Keep short.

3 • TASKS

Pull tasks due today or overdue from [YOUR_TASK_TOOL]. If a task and an email refer to the same item, merge into one line.

4 • NEWS (last 48h)

Top 3–5 news items relevant to [YOUR_INDUSTRY]. For each: bold headline, 2-sentence summary, source URL on its own line. Skip paywalled sources. If nothing is genuinely relevant, say "Nothing notable today" – don't invent.

5 • RECOMMENDED ACTIONS

Surface 3–5 proactive nudges from the sections above. Format each as:
what → why now → next step.

DELIVERY

Post the completed brief to [YOUR_DELIVERY_CHANNEL] (Slack DM, Teams DM, or email). Keep each message under 4,000 characters – split if needed. Use ***bold*** for headlines, bullets for items, URLs on their own line.

First line: Daily Brief – [Day, Month Date, Year].

READ-ONLY

Never send, reply to, or delete anything. Never accept a meeting or change a calendar entry. You surface and recommend; the user decides and acts.

FAILURE HANDLING

If any section errors or a connector is unavailable, send the rest of the brief anyway and note "[Section] unavailable today." **Never skip the entire brief** – a partial brief you can trust beats silence.

Optional modules

Add each one only if it matches your actual workflow.

A • Sales pipeline

IF YOU HAVE A CRM

Adds a live watchlist of your active accounts. Anything in your inbox, calendar or news touching a watchlist account gets flagged and floats to the top of its section. Also adds a "pipeline hygiene" sweep for stale deals and quiet outreach.

ADD BEFORE STEP 1

STEP 0 — LOAD PIPELINE. Read [\[CRM_LOCATION\]](#) (e.g. a Google Sheet ID, HubSpot view, Salesforce report).

Watchlist = every company in [\[HOT_STAGES\]](#) with their contacts. Anything in email, calendar or news touching a watchlist company gets tagged and floats to the TOP of its section.

ADD AFTER STEP 5

STEP 6 — HYGIENE SWEEP. Three checks: (1) Stale hot deals — watchlist accounts with no touch in 10+ days. (2) Quiet outreach — sent mail with no reply in 3–7 days. (3) Slipped commitments — promises past due with no evidence of completion. Cap at 5 items total.

B • Competitor watch

IF YOU TRACK NAMED COMPETITORS

Adds a dedicated news section that scans for moves from a fixed list of competitors — launches, funding, product announcements.

ADD TO STEP 4 (NEWS)

Add a **Competitor Watch** section covering [\[COMPETITOR_1..N\]](#). Any move directly toward the problem you solve is top priority — mark it clearly.

C • Meeting-notes capture

IF YOU USE GEMINI / OTTER / FIREFLIES

Captures action items and commitments from your call recordings, so promises made verbally get tracked instead of forgotten.

ADD TO TOP OF STEP 2 (INBOX)

First, search Gmail for meeting-notes captures — sender meet-notes@google.com, or subjects containing "Notes by Gemini", "Otter", or "Fireflies". Extract action items and commitments and **feed them into** the buckets in Step 2. Don't summarise the notes in isolation.

Optional modules — continued

Rhythm and reach. Both are cheap to add.

D • Day variants

IF YOU WANT A WEEKLY CADENCE

Adds a Monday "Week Ahead" and a Friday "Week Recap" block — a cheap way to build a rhythm without building a second system.

ADD ANYWHERE IN THE PROMPT

MONDAY: add a "Week Ahead" block after Calendar — external meetings across the week with a one-line readiness status each.

FRIDAY: add a "Week Recap" block before Recommended Actions — wins, commitments closed this week, outreach sent vs. replies. Keep news lighter, plus one "weekend read" pick.

E • Regional news

IF YOU SELL IN MULTIPLE MARKETS

Splits the news scan by region so you're not drowning in the wrong country's coverage.

MODIFY STEP 4 (NEWS)

Instead of one flat news section, categorise by region: `[REGION_1]`, `[REGION_2]`, `[REGION_3]`. If a region has nothing genuinely relevant, write "Nothing notable today" — do **not** pad.

Where to run it

This is a scheduled task, not a chat. In Claude's desktop app that's **Settings** → **Connectors** to grant read access to each tool, then a **scheduled task** holding the prompt — set to run each morning before you start. ChatGPT, Gemini and Copilot each have an equivalent; the prompt doesn't change.

ON ENTERPRISE STACKS

If your company is a Microsoft shop, the same framework applies — Copilot with SharePoint, OneDrive and Teams in place of Drive, Gmail and Slack. And if you don't have these capabilities at work yet, that's a conversation worth having with your IT lead. Use the tools your organisation has sanctioned, on your work account — not a personal one.

Placeholders

The core needs six. Modules add a handful more.

Core placeholders

PLACEHOLDER	WHAT TO PUT IN
[YOUR_TIMEZONE]	IANA timezone string, e.g. America/Toronto, Europe/London
[YOUR_NAME]	Your first name — used in commitment tracking
[YOUR_ROLE]	Role or title — helps the model judge what "matters"
[YOUR_INDUSTRY]	e.g. "SaaS", "automotive retail", "commercial real estate"
[YOUR_TASK_TOOL]	e.g. ClickUp, Asana, Linear, Notion, Todoist
[YOUR_DELIVERY_CHANNEL]	Where the brief lands — Slack DM, email address, or Teams DM

Module placeholders — only if you use them

PLACEHOLDER	MODULE	WHAT TO PUT IN
[CRM_LOCATION]	A	Google Sheet ID, HubSpot view, Salesforce report — wherever your pipeline lives
[HOT_STAGES]	A	Which pipeline stages count as "active hot deals"
[COMPETITOR_1..N]	B	Named competitors to monitor in the news scan
[REGION_1..N]	E	Countries or markets to split the news scan by

ONE THING TO KNOW

This template is designed to be lived with. Run the core for a week. Notice what's missing. Add one module at a time. Don't try to build the "complete" version on day one — the tuning is what makes it useful, and tuning only happens with real use.

Built for CXP Live Ep. 02 — *Meet your AI Chief of Staff*.
Pairs with the AI Second Brain template. Start here; build that one when "what's on today" stops being the problem.