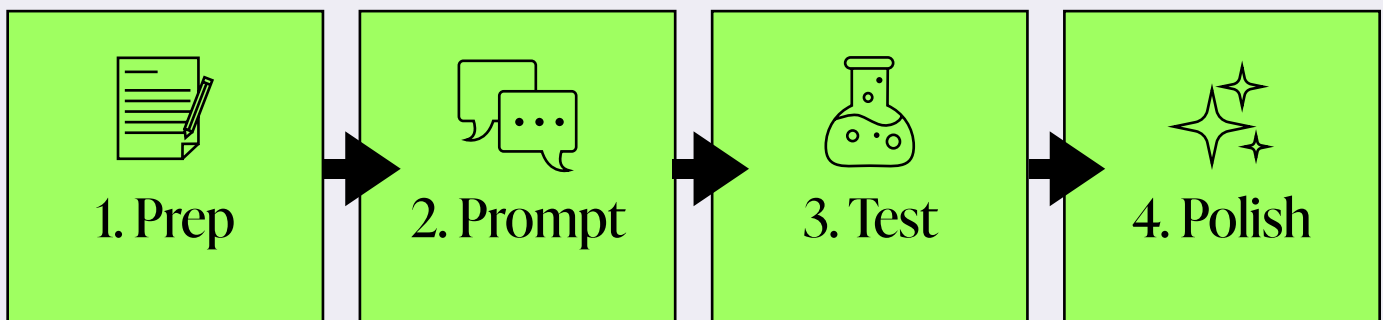


# Custom GPT Workbook

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A collaborative product requirements document that helps you make custom GPTs your overperformers



# 1. Prep

The first step is to define the scope of the Custom GPT. Breakdown how the Custom GPT will be used, by who, and what success looks like.

**OVERVIEW** Define what the purpose of the Custom GPT is and what your desired outcome is.  
*e.g. The MQL reporting GPT is an automated report generator. It aims to take our weekly website performance data and extract marketing qualified leads.*

The \_\_\_\_\_ is a \_\_\_\_\_  
GPT name Brief description of GPT

It aims to \_\_\_\_\_  
Primary goal of GPT

**OBJECTIVES** What should you be able to use the Custom GPT to do?  
*e.g. Clean the weekly reporting data, Format it into a table, write an executive summary on key updates.*

- 1.
- 2.
- 3.

**USERS** What team members will be using this Custom GPT?  
*e.g. Danielle from Sales, Mike from Data, Rachel from Marketing.*

- 1.
- 2.
- 3.

## FUNCTIONAL REQUIREMENTS

List the specific and measurable key features that your GPT must have to meet its objectives  
*e.g. Analyzes key trends in data and compares them week over week.*

For each key feature, provide 2-3 detailed behaviors that describe how the feature should work  
*e.g. The report is generated in .xls format with these filters...*

1. Key feature:
  - Behavior 1:
  - Behavior 2:
2. Key feature:
  - Behavior 1:
  - Behavior 2:

3. Key feature:

- Behavior 1:
- Behavior 2:

### **NON-FUNCTIONAL REQUIREMENTS**

List the qualitative attributes that describe how your GPT should perform its functions. These requirements focus on the GPT's overall characteristics and user experience, rather than specific features. — such as writing tone, ethical considerations etc.

*e.g. The report should be clear, direct, and concise for an executive audience.*

- 1.
- 2.
- 3.

**OUT OF SCOPE** Define the things that the Custom GPT *won't* do.

*e.g. The GPT won't report on unqualified leads.*

- 1.
- 2.
- 3.

Notes:

# 2. Prompt

The second step is to create the prompt instructions that will tell the Custom GPT how to achieve your desired goal.

## OBJECTIVE

*e.g. You are an MQL reporting GPT, a data analyst and report generator. Your task is to analyze the weekly website performance data, extract the leads that indicated interest in our product, and generate a table and associated executive summary.*

You are \_\_\_\_\_, an \_\_\_\_\_  
GPT name The GPTs role

Your task is to \_\_\_\_\_  
The GPTs objective

## CONTEXT

*e.g. The MQL reporting GPT is designed to analyze trends in website traffic and present leads ready for nurture in a table with an executive summary. This task is needed because our CEO is tracking MQLs as a part of our H2 growth metrics and needs something easy to scan before our weekly call.*

\_\_\_\_\_ is designed to \_\_\_\_\_  
GPT name Intended result or benefit

\_\_\_\_\_  
Background on why the task needs to be done

## TASK BREAKDOWN

**STEP 1:** You will \_\_\_\_\_  
(e.g. ask questions / review information / etc...)

**STEP 2:** You will \_\_\_\_\_ to \_\_\_\_\_  
(e.g. browse with Bing / use DALLE) Purpose of step 2

**STEP 3:** You will \_\_\_\_\_  
Additional steps

## RULES

Your response will \_\_\_\_\_  
Parameters for the formatting of the response such as length or style

Never \_\_\_\_\_  
List boundaries, constraints or limitations such as topics to avoid or outputs to prevent

# 3. Test

This section is designed to help you systematically evaluate and refine your GPT's performance. It's divided into three parts: Basic Functions, Intermediate Functions, and Advanced Functions. Each part allows you to assess different levels of complexity in your GPT's capabilities.

## **BASIC FUNCTIONS**

List at least three of the most basic functions that your tool needs to perform. Think about the most essential things it needs to understand or do in order to accomplish its objectives. Then reflect on how it performs. Give each function a letter grade (A-F) then take notes on the results (positive and/or negative). Add more rows by right-clicking the last box and selecting "Insert row below"

BASIC FUNCTION	LETTER GRADE	NOTES

## INTERMEDIATE FUNCTIONS

Go one step deeper. What more involved functions does your GPT need to perform to make good on your vision? Follow the same steps that you did for basic functions. Add more rows by right-clicking the last box and selecting "Insert row below"

INTERMEDIATE FUNCTION	LETTER GRADE	NOTES

## ADVANCED FUNCTIONS

Now think of what your GPT would do in its ideal version. What user errors or edge cases can it account for in a best case scenario? What is the most complicated version of a function that it can help a user with? Follow the same steps that you did for basic and intermediate functions. Add more rows by right-clicking the last box and selecting "Insert row below"

ADVANCED FUNCTION	LETTER GRADE	NOTES

Notes:

# 4. Polish

In this section, create an optimization plan based on your testing results. Identify the top three priorities for improving your GPT's performance. For each priority:

1. Briefly state the area needing improvement.
2. List specific, actionable adjustments to address the issue.

**Remember:** Keep your planned adjustments focused on the original scope and achievable.

## OPTIMIZATION PLAN

### PRIORITY 1:

Planned adjustments:

### PRIORITY 2:

Planned adjustments:

### PRIORITY 3:

Planned adjustments:

### PRIORITY 4:

Planned adjustments:

### PRIORITY 5:

Planned adjustments:

Notes: