

Onboard Your AI: Stop Making It Guess

How to onboard ChatGPT, Claude or Copilot
so it actually understands how you work.

GUIDES & RESOURCES

GUIDE · 2 PAGES

Most people open a new AI tool, ask it for something important and feel disappointed when the answer is generic. The tool is new to your world. Of course it is guessing. Give it the same advantage you would give a thoughtful new teammate: context, examples, clear standards and feedback.

Six habits that make the difference

01 Explain the job before assigning the task

Tell it what you do, who the work is for and what a good result needs to accomplish. Do not make it reverse-engineer your role from one request.

02 Write an aspiration list and an avoid list

Aspiration words describe what good feels like. An avoid list is often even more useful: too formal, too salesy, too long, too cautious, too polished. Specific dislikes give the AI edges to work with.

03 Let it interview you

You do not need to write the perfect setup document alone. Ask the AI to question you, one answer at a time, then turn what it learns into instructions.

04 Show examples

Give it one piece of work you like and, when possible, one you do not. Explain why. Examples teach nuance faster than a pile of adjectives.

05 Correct it in the moment

“This is bad” teaches very little. Say what missed: the opening is too formal, the recommendation is buried or the tone sounds like a sales email. Then have it try again.

06 Save what should repeat

Put durable preferences in memory or instructions. Turn a repeatable method into a skill. Keep one-time details in the current project or conversation.

Three prompts to copy

BUILD YOUR WORKING INSTRUCTIONS

Ask me one question at a time about my role, priorities, communication style and how I want you to challenge me. When you have enough information, draft a concise set of instructions for how you should work with me. Show me the draft before treating it as final.

LEARN MY VOICE

Review these examples of my writing. Identify the patterns that make them sound like me, including sentence rhythm, level of formality, words I use and things I avoid. Ask me about anything ambiguous. Then draft a short voice guide we can test on a new piece.

FIND A USEFUL PLACE TO START

Ask me five questions about what I am working on and what keeps slowing me down. Build each question from my previous answer. Then recommend three specific ways you could help this week, starting with the smallest useful experiment.

A note on ChatGPT, Claude and Copilot

The settings and labels differ, and they will keep changing. Do not memorize the menu. Look for the places your platform stores memory, personal instructions, project context and reusable workflows. Review them occasionally, especially when the AI starts acting on old information.

Keep sensitive work intentional

Follow your organization's policy. Use temporary or private modes for one-off conversations when available, keep truly sensitive information out and check what the AI can access before approving actions.

WATCH THE WORKSHOP

Watch the full [Customize + Onboard Your AI](#) workshop recording.

Want Forum3 to run this with your team? [Let's talk](#)