



AI Execution Checklist

The one-page framework for getting reliable AI output, every time.

Three phases. Nine checks. Use this every time you ask AI to do real work — until it becomes muscle memory. **Setup** means choosing what to share and feeding AI the right inputs. **Prompt** means asking the right way. **Validate** means catching the things AI can get wrong.

1 A. SETUP

Before you ask anything

☐ Be thoughtful about what data you share with AI tools

Only **ChatGPT Business** contractually promises to protect your inputs — free and personal versions may use your data to train their models. If you're not sure, ask SafePoint.

☐ Gather all your source materials in one place

Documents, screenshots, exports, emails, notes — get them ready *before* you write the prompt.

☐ Upload the sources *first*, then write the prompt

AI references uploaded files automatically. Uploading after the prompt confuses the conversation.

2 B. PROMPT

Make the request usable

☐ State the goal — and who the output is for

"Draft a one-page summary **for our leadership team**" beats "summarize this" every time.

☐ Add the constraints AI couldn't guess

Budget, timeframe, audience, tone, brand rules, things to avoid. Be specific.

☐ Specify the output format

Table, bullets, draft email, executive recap, comparison grid — tell it exactly what shape you want.

☐ Ask it to flag uncertainty and missing info

Add this line: "List your assumptions and flag what you're uncertain about. Don't guess."

3 C. VALIDATE

Before you use the output

☐ Verify every name, date, dollar amount, and statistic

AI is confident even when it's wrong. Anything business-critical gets a human check.

☐ Ask follow-up questions instead of accepting guesses

If something looks invented, push back: "Where did you get this?" or "Show me the source."

PRO TIP

If your output is wrong or off-target, don't start over. **Reply with what's wrong** — AI improves the next response based on your feedback. Treat it like a junior colleague, not a vending machine.