



PRACTICAL AI IN ACTION

The Prompt Pack

Three copy-and-paste prompts your team can use today — drawn from the live demos in our webinar. Each one comes with what to upload, what to swap in, and how to keep the output trustworthy.

PROMPT 01

Build a draft from multiple sources

Turn scattered documents into a polished, structured first draft.

PROMPT 02

Compare options against a priority

Make procurement and vendor decisions with a clear ranked recommendation.

PROMPT 03

Turn a data export into insight

Transform raw CSVs into a management-ready report in seconds.

How to use this pack

1. **Upload your sources first** — documents, screenshots, exports — then paste the prompt. AI references uploaded files automatically.
2. **Replace the highlighted placeholders** with your specifics. Each prompt has a "what to swap in" guide on its page.
3. **Add the verification line** from the bottom of each page. It tells AI to flag uncertainty instead of guessing.
4. **Verify before you use it.** Names, dates, numbers, and anything client-facing always get a human check.

SAFETY

Be thoughtful about what 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. When in doubt, ask SafePoint IT.



Build a Draft from Multiple Sources

Turn scattered documents into a polished first draft — proposal, summary, or report.

WHEN TO USE IT

Anytime you'd normally read three documents and write one. Proposals, executive briefs, project recaps, client summaries.

WHAT TO UPLOAD FIRST

Source files (Word, PDF, notes). Aim for 2–4 documents per task. Make sure PDFs are text-based, not scanned images.

THE PROMPT

[Copy & paste](#)

You are a **[ROLE – e.g., professional financial planner]**. I have uploaded **[NUMBER]** **[DOCUMENT TYPE]** for review.

Using only the information provided in the uploaded files, please create a **[OUTPUT TYPE – e.g., comprehensive proposal]** that includes:

1. Executive Summary – a brief snapshot of the situation
2. Goals – summarize the stated short-term and long-term goals
3. Current Snapshot – the relevant facts, figures, or context
4. Gap Analysis – risks or shortfalls between current state and goals
5. Recommendations – specific, actionable next steps
6. Proposed Action Plan – a prioritized 12-month plan with clear next steps

Format the output as a professional **[AUDIENCE]**-facing document with clear section headings. Use plain language – avoid jargon. Flag any areas where additional information would strengthen the output.

WHAT TO SWAP IN

- **[ROLE]** — the expertise lens (e.g., "operations manager," "marketing strategist")
- **[DOCUMENT TYPE]** — what you uploaded (e.g., "client briefs," "vendor proposals")
- **[OUTPUT TYPE]** — the deliverable (proposal, executive brief, summary)
- **[AUDIENCE]** — who reads it (client, leadership, internal team)

ADD THIS LINE TO VERIFY

"List your assumptions and flag what you're uncertain about — don't guess."

This is the single most important line in any AI prompt. It turns a confident guesser into a careful collaborator.



Compare Options Against a Priority

Get a ranked recommendation for purchases, vendors, or any "which one should we pick" question.

WHEN TO USE IT

Any time you're comparing 3–6 options and need a clear recommendation: equipment, software, vendors, services, even job candidates.

WHAT TO UPLOAD FIRST

Product pages, spec sheets, screenshots from retailer sites, or vendor proposals — one file per option. Crop screenshots to show name, price, key specs.

THE PROMPT

[Copy & paste](#)

You are a professional procurement advisor. I have uploaded product listings (PDFs and/or screenshots) for several **[ITEM CATEGORY – e.g., "office desk chairs"]** options I am considering.

Our purchasing priority is: **[CHOOSE ONE: Best Overall Value / Lowest Cost / Highest Quality / Best Reviewed]**

Additional context: **[OPTIONAL – e.g., "Used 8+ hours/day. Budget ceiling \$400/unit. Need 10."]**

Please review all uploaded product files and:

1. Extract the key details from each: product name, price, rating/reviews, notable specs
2. Evaluate all options against our stated priority
3. Eliminate any options that fail the additional context criteria
4. Rank the top 3 options and explain why each made the list
5. Give a clear final recommendation with a one-paragraph justification
6. Present a comparison table: Product Name, Price, Rating, Pros, Cons, Score

Base your analysis only on the information visible in the uploaded files. If a key detail is missing from any file, note it in the table rather than assuming a value.

WHAT TO SWAP IN

- **[ITEM CATEGORY]** — what you're buying (chairs, software, vendors)
- **[PRIORITY]** — pick one. This single choice changes the recommendation.
- **[OPTIONAL CONTEXT]** — budget, headcount, use case, must-haves

PRO MOVE: RE-RUN WITH A NEW PRIORITY

After the first answer, ask: **"Now re-run this with priority = Lowest Cost."**

Seeing two rankings side-by-side often reveals which option is genuinely strong vs. just well-marketed.



Turn a Data Export Into Insight

Transform a raw CSV into a management-ready report in seconds — no data science required. **SafePoint IT**

WHEN TO USE IT

Sales reports, survey results, support ticket exports, payroll summaries — any spreadsheet you'd otherwise spend an afternoon analyzing.

WHAT TO UPLOAD FIRST

A clean CSV. Clear column headers, no merged cells, one data type per column. Aim for 15+ rows so the analysis is meaningful.

THE PROMPT

[Copy & paste](#)

You are a business analyst. I have uploaded a **[DATASET TYPE – e.g., monthly sales performance]** dataset.

Please analyze the data and deliver a management report that includes:

1. Overall Performance Summary – totals and % of target achieved
2. Top 3 Performers – with a note on what drove their results
3. Bottom 3 Performers – with observations on where the gap exists
4. Breakdown by **[DIMENSION 1 – e.g., region]** – strongest and weakest
5. Breakdown by **[DIMENSION 2 – e.g., product category]** – most and least revenue
6. Trend Observations – compare to prior period; flag notable shifts or anomalies
7. Attention Items – flag anything more than **[THRESHOLD – e.g., 20%]** below target
8. Recommended Focus Areas – 3 priorities for the next period

Write in a concise, executive-friendly tone. Use tables where appropriate to summarize comparisons.

WHAT TO SWAP IN

- **[DATASET TYPE]** — what's in the file (sales, survey, tickets)
- **[DIMENSION 1 & 2]** — the two most important columns to slice by
- **[THRESHOLD]** — your "this needs attention" line (e.g., 20% below)

THEN GO DEEPER

After the first report, ask: **"Now show me just [Region X] and compare month over month."**

AI keeps the dataset loaded — you can keep slicing without re-uploading.



NEXT STEP

Want help putting these prompts to work?

Scan the QR code or visit our event page to book a 15-minute consultation call with the SafePoint team. We'll help you adapt these prompts to your real workflows — securely, with the right tool for your data.