

A Guide to Prompt Engineering for Business Users

Getting started with AI assistants and transforming your daily workflows with smart prompting strategies.



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Disclaimer: responsible use of AI

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Important disclaimer: Responsible use of AI

AI-generated content requires human oversight

While AI tools are powerful assistants that can dramatically improve efficiency, creativity, and productivity, it's crucial to understand that AI-generated content must always be carefully verified by a human. Many AI tools are prone to "hallucinations," errors, false answers or information, or information that is stale, making human review an essential step in your workflows. All content generated by AI should be treated as a first draft that requires the same level of review, fact-checking, and editing as any other content your organization produces.

Your company remains fully responsible

Your organization maintains complete responsibility for all content it publishes, whether created by employees or with AI assistance. This means every piece of AI-generated content must be reviewed to ensure it complies with your company's brand guidelines, tone of voice, accuracy standards, and legal requirements. AI needs to prove that it is trustworthy, and that proof comes through your diligent review process. Remember that if you use content generated by AI and someone is negatively impacted by it, then that person or company could pursue legal action for compensatory or punitive damages that the company or you personally are responsible for. The prompting techniques in this guide are designed to help you get better AI outputs, but they don't replace the need for human judgment, expertise, and final approval before any content goes public.

1. Getting Started with AI Prompts

What is prompt engineering?

Think of prompt engineering as learning how to have more effective conversations with AI assistants like ChatGPT, Claude, Copilot, or Perplexity. Just like you'd give clearer instructions to a new team member to get better results, the way you phrase your requests to AI dramatically impacts what you get back.

The good news? **This isn't really engineering, and you don't need to be a tech expert.** You just need to learn how to communicate clearly and strategically with these tools.

If you know how to converse in a chat window with a coworker, you have all the tools you need to have fun and get more done using your AI assistant!

Why this matters for your work

AI assistants can handle dozens of tasks that eat up your day—from drafting emails to researching prospects to creating content. But here's the thing: a vague prompt gets you generic, less helpful results. A well-crafted prompt gets you content that's actually useful and saves you hours.

The difference between:

- "Write an email" vs. "Write a follow-up email to a potential client who attended our webinar but hasn't responded to our initial outreach"
- "Research this company" vs. "Find 3 recent business challenges this company might be facing that our software could help solve"

Most common use cases to get you started

Before we dive into advanced techniques, here are the everyday scenarios where AI shines:

- **Email drafting and editing** - From cold outreach to customer follow-ups
 - **Research and summarization** - Company background, industry trends, competitive analysis
 - **Content creation and editing** - Social posts, blog outlines, marketing copy
 - **Planning and organization** - Meeting agendas, project timelines, task lists
 - **Analysis and insights** - Data interpretation, customer feedback analysis
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2. Essential tips for better AI conversations

Give the AI a role

One of the fastest ways to improve your results is to tell the AI what role it should play. This helps it understand the context and tone you're looking for.

Examples:

- "You're an experienced sales development representative..."
- "Act as a content marketing strategist..."
- "You're a customer success manager helping to..."

Be specific about your audience

Always clarify who the output is for. The AI will adjust its language, tone, and approach accordingly.

Instead of: "Write a product description" **Try:** "Write a product description for busy IT managers who need to quickly understand if this solution fits their security requirements"

Provide context and constraints

The more relevant background you provide, the better your results. Include:

- **What you're trying to achieve**
- **Who your audience is**
- **Any specific requirements** (length, tone, format)
- **What you want to avoid**

Example: "I need a LinkedIn post about our new feature launch. Our audience is small business owners who are not very technical. Keep it under 150 words, focus on the business benefit rather than technical details, and include a clear call-to-action."

Ask for what you need

Don't be shy about requesting specific formats or approaches:

- "Give me 5 different subject line options"
- "Write this in bullet points"
- "Create a table comparing these three options"
- "Make this sound more conversational"
- "Provide examples for each point"

Use follow-up questions

Think of AI conversations as iterative. Your first prompt rarely gives you the perfect final result—and that's okay! Use follow-ups to refine:

- "Make this more persuasive"
- "Shorten this to one paragraph"
- "Add more specific examples"
- "Change the tone to be more professional"

Give examples when possible

If you have examples of what good looks like, share them. The AI can match style, structure, and approach.

"Here's an email that worked well for us: [paste example]. Write something similar for this new prospect but focus on their manufacturing industry instead of retail."

3. Using source materials to supercharge your prompts

One of the most powerful ways to get dramatically better results from AI is to provide it with source materials, whether that's links to websites, uploaded documents, or pasted content. Think of it as giving the AI the same background materials you'd give to a new team member before asking them to complete a task.

Why source materials make such a difference

When you include relevant source materials, you're essentially giving the AI:

- **Specific context** it can't guess at
- **Your company's actual voice and messaging** rather than generic corporate speak
- **Real details** about prospects, competitors, or market conditions
- **Examples of what good looks like** in your organization

The difference in output quality is night and day.

Types of source materials that work best

Prospect research:

- Company websites, About Us pages, recent news articles
- LinkedIn profiles of key contacts
- Industry reports or case studies
- Their social media content or blog posts

Your company materials:

- Sales presentations, pitch decks, or proposal templates
- Product datasheets or specification documents
- Case studies and customer success stories
- Brand guidelines or messaging documents
- Previous successful emails or campaigns

Competitive intelligence:

- Competitor websites, pricing pages, or feature comparisons
- Industry analysis reports
- Customer review sites or G2/Capterra profiles

Practical examples

Before (Generic): "Write a cold outreach email to a potential customer in the healthcare industry."

After (with source materials): "I'm reaching out to Dr. Sarah Chen, the Chief Medical Officer at Regional Health Network. I've attached their recent press release about expanding telemedicine services and their 'About Us' page from their website. Using this information about their current initiatives, write a personalized outreach email positioning our patient communication platform as a way to enhance their telemedicine patient experience. Reference specific details from these materials to show we understand their priorities."

Another example: "I need to create a customized sales presentation for TechFlow Industries. I've attached our standard sales deck and a link to their company website and recent quarterly report. Adapt our presentation to focus on the challenges they mention in their report—specifically around operational efficiency and cost management. Use our existing case studies but emphasize outcomes that align with their stated goals."

Best practices for using source materials

Be specific about what to focus on: Don't just dump materials and hope for the best. Guide the AI to the most relevant parts.

"Review the attached competitor analysis and their pricing page. Focus on the sections about enterprise features and create talking points for why our approach to data security is superior to theirs."

Combine multiple sources for richer context: "Using the prospect's website, their recent LinkedIn post about expansion challenges, and our case study with a similar company in their industry, create a value proposition that addresses their specific growth pains."

Ask for integration, not copying: Make it clear you want the AI to synthesize and adapt, not just copy.

"Based on the attached sales presentation and the prospect's needs assessment, create new slides that blend our messaging with solutions to their specific challenges. Don't just copy our existing slides—adapt them to their situation."

Provide quality control guidelines: "Use the attached brand guidelines to ensure the tone and messaging stay consistent with our company voice while personalizing for this specific prospect."

Pro tips

For Sales Teams:

- Always include the prospect's website when crafting personalized outreach
- Attach your best-performing sales materials as templates
- Include mutual connection information or referral context when available

For Marketing Teams:

- Upload competitor materials when creating positioning documents
- Include customer feedback or survey results for campaign development
- Attach successful past campaigns as style and structure guides

Technical note: Different AI platforms handle attachments differently. Some let you upload files directly, others work better with copied and pasted text, and some can access live web links. Test what works best with your chosen platform, but the principle remains the same—more relevant context equals better results.

Remember: the goal isn't to replace your expertise, but to give the AI enough context to act as an informed collaborator rather than starting from scratch every time.

4. Using AI as your personal learning assistant

One of AI's most underrated superpowers is its ability to help you quickly get up to speed on new topics, technologies, or business concepts. Think of it as having a patient, knowledgeable colleague who's always available to explain things in whatever way makes sense to you.

The power of conversational learning

Unlike searching Google or reading dense reports, AI lets you have a real conversation about what you're trying to understand. You can ask follow-up questions, request examples, or say "I don't get it—explain it differently" until concepts click.

Start with the big picture: "I need to understand customer journey orchestration tools for our marketing team. I'm not technical, but I need to grasp what these tools do, why they matter, and how to evaluate them. Start with the basics and use simple business terms."

Then dive deeper: "That makes sense. Now give me a specific example of how a B2B software company like ours would use journey orchestration differently than an e-commerce business."

Ask for practical context: "What questions should I be asking vendors when we're evaluating these tools? What are the red flags to watch out for?"

Positioning AI as your subject matter expert

The key is to give AI a specific expert role that matches what you need to learn.

Examples:

- "You're a seasoned sales operations manager explaining CRM implementation to someone who's never managed one before..."
- "Act as a digital marketing consultant teaching me about attribution modeling. I understand basic analytics but need to grasp multi-touch attribution..."
- "You're a customer success expert helping me understand churn analysis. Walk me through how to identify at-risk customers..."

Sample learning conversation

Your prompt: "I'm a sales manager who needs to understand account-based marketing (ABM) because our marketing team wants to implement it. I've heard the term but don't really know what it means or how it affects my sales process. Explain ABM like I'm smart but completely new to the concept."

Follow-up questions you might ask:

- "How is this different from what we're already doing with lead scoring?"
- "What would my sales team need to do differently day-to-day?"
- "Give me an example of what an ABM campaign would look like for a company like ours"
- "What metrics should I care about if we implement this?"
- "What are the biggest mistakes companies make with ABM?"

Test your understanding

At the end of your learning session, use AI to quiz yourself:

"Based on everything we just discussed about customer journey orchestration, create a 5-question quiz to test whether I really understand the key concepts. After I answer, give me feedback on what I might need to review."

Or:

"I need to explain ABM to my sales team next week. Ask me questions that help me practice explaining the concepts clearly and let me know if my explanations need work."

5. Using AI for document review and content updates

AI excels at taking your existing content and making it better—whether that's proofreading a draft, updating outdated materials, or adapting content for new situations.

Types of document review AI can handle

Basic editing and proofreading:

- Grammar, spelling, and punctuation fixes
- Clarity and flow improvements
- Tone consistency checks
- Formatting and structure suggestions

Content enhancement:

- Adding missing information or context
- Strengthening weak arguments or sections
- Improving transitions between ideas
- Suggesting more compelling examples

Strategic updates:

- Refreshing outdated information
- Adapting content for new audiences
- Incorporating new data or developments
- Restructuring for different purposes

Practical examples

Proofreading and editing: "Review this proposal draft for our new client. Check for grammar and clarity but also look for places where the value proposition could be stronger or where we're being too generic. The audience is technical decision-makers who care about ROI and implementation ease."

Updating existing materials: "I have a sales presentation from 6 months ago for TechFlow Industries. Since then: their budget increased from \$50K to \$75K, they hired a new CTO who prioritizes security, and we launched a new integration feature they specifically requested. Update this presentation to reflect these changes and reposition our pitch accordingly."

Content enhancement: "This blog post draft covers the basics but feels thin. Add 2-3 more practical examples, strengthen the introduction to better hook our target audience (marketing managers), and suggest a more compelling conclusion with clear next steps."

Repurposing content: "Take this detailed case study and create three versions: a one-page executive summary, a social media post series, and talking points for our sales team. Keep the core story but adapt the focus and detail level for each audience."

Best practices for document review

Be specific about what you need: Instead of "make this better," try "this email feels too pushy—soften the tone while keeping the urgency" or "add more credibility elements to support our claims."

Provide context about your audience: "This is for senior executives who get hundreds of emails daily—make it scannable and front-load the value proposition."

Ask for explanations: "Explain why you made these changes so I can apply the same principles to future documents."

Use AI for multiple passes:

- First pass: Structure and flow
- Second pass: Tone and clarity
- Third pass: Final proofread and polish

Sample comprehensive review prompt: "Review this quarterly business review presentation. The audience is our biggest client's C-suite team. Check for: 1) Logical flow and story arc, 2) Data visualization clarity, 3) Appropriate executive-level language, 4) Strong conclusions and next steps, 5) Any missing elements that would strengthen our case for contract renewal. Provide specific suggestions for improvement, not just general feedback."

The key is treating AI as a collaborative editor who can see your content with fresh eyes and suggest improvements you might miss when you're too close to the material.

6. Common business use cases

Let's walk through some everyday scenarios you'll encounter, with before-and-after prompts to show you the difference good prompting makes.

Email drafting

Weak prompt: "Write an email to a client"

Strong prompt: "Write a professional follow-up email to Sarah Chen, the VP of Operations at TechFlow Industries. We met at the Manufacturing Excellence Conference last week where she mentioned they're struggling with inventory management delays. Our software helps reduce processing time by 40%. Keep it friendly but professional, reference our conversation, and suggest a 20-minute call to discuss how we might help."

Creating to-do lists and project planning

Weak prompt: "Make a to-do list for launching a product"

Strong prompt: "Create a comprehensive launch checklist for our new CRM integration feature. We have 6 weeks until launch, and the audience is existing customers plus prospects in our trial program. Include tasks for product marketing, sales enablement, customer communications, and support team preparation. Organize by priority and estimated timeline."

Simple research tasks

Weak prompt: "Tell me about Microsoft"

Strong Prompt: "I'm preparing for a sales call with Microsoft's procurement team. Research their recent initiatives around sustainability and cost reduction. I need 3-4 key points I could reference to show we understand their priorities, plus any recent news or changes in leadership that might be relevant for building rapport."

Meeting preparation

Strong prompt: "I have a quarterly business review with our biggest client tomorrow. They've been using our platform for 18 months, recently expanded to 3 new departments, but had some integration issues in Q2 that we resolved. Help me create an agenda that covers their wins, addresses any lingering concerns, and positions our new analytics module as a natural next step."

7. Marketing and Sales-specific applications

Now let's get into the meat of how AI can transform your daily marketing and sales activities.

Sales use cases

Personalizing outreach emails

"Create a personalized cold outreach email for John Martinez, the CFO of GrowthTech Solutions, a 200-employee SaaS company that just raised Series B funding. Based on recent news about their expansion plans, position our expense management software as helping them scale efficiently while maintaining financial controls. Keep it under 100 words and include a specific call-to-action for a 15-minute call."

Creating follow-up sequences

"Design a 4-email follow-up sequence for prospects who downloaded our ROI calculator but haven't responded to our initial outreach. Each email should provide additional value while moving them toward a demo. Include different angles: peer success story, industry benchmark data, implementation ease, and risk mitigation. Space them 4-5 business days apart."

Generating discovery call questions

"I'm meeting with the head of customer service at a mid-sized e-commerce company. They mentioned high ticket volume and customer wait times in our initial conversation. Create 8-10 discovery questions that will help me understand their current process, pain points, and decision-making criteria for a new customer service platform."

Summarizing meeting notes

"Summarize these meeting notes from my call with ProTech Industries. Identify: key pain points discussed, budget range mentioned, decision timeline, other stakeholders involved, main objections or concerns, and suggested next steps. Then recommend my follow-up strategy."
[Paste your meeting notes here]

Creating tailored proposals

"Help me customize our standard proposal for DataFlow Corp. Based on our discovery call, their priorities are: reducing manual data entry (currently takes 20+ hours/week), improving accuracy (they have 15% error rate), and ensuring easy integration with their existing Salesforce setup. Adapt our value proposition and pricing presentation to focus on these specific outcomes."

Marketing use cases

Social media content creation

"Create 5 LinkedIn posts for our cybersecurity software company. Target audience is IT directors at mid-sized companies. Topics should include: recent security threats, best practices, industry news reactions, behind-the-scenes company culture, and thought leadership. Each post should be 100-150 words with appropriate hashtags and clear engagement hooks."

Blog post development

"Create a detailed outline for a 1,500-word blog post titled 'How Remote Teams Can Maintain Data Security: A Practical Guide.' Our audience is IT managers and business owners managing distributed teams. Include an introduction, 5-6 main sections with actionable tips, real-world examples, and a conclusion with next steps. Focus on practical, implementable advice rather than high-level theory."

Email marketing campaigns

"Design a 3-email welcome sequence for new subscribers to our project management software newsletter. Email 1: Welcome and set expectations. Email 2: Share our most popular resource (project planning template). Email 3: Introduce key features with a trial offer. Maintain a helpful, non-pushy tone throughout. Include clear CTAs and value in each email."

Content calendar planning

"Create a 4-week content calendar for our B2B marketing agency's social media. Focus on LinkedIn and Twitter. Include a mix of: industry insights, client success stories, team highlights, and educational content. Vary post formats: text updates, questions for engagement, document carousels, and video ideas. Organize by week and platform."

Marketing copy creation

"Write compelling copy for our homepage hero section. Our project management software helps marketing teams coordinate campaigns 50% faster than traditional methods. Target audience is marketing managers at growing companies who are frustrated with missed deadlines and poor team coordination. Include a headline, 2-3 benefit bullet points, and a clear CTA button text."

Customer persona development

"Help me create a detailed customer persona for our accounting software. Based on our current customer data, our typical user is a small business owner (10-50 employees) who's outgrown QuickBooks but isn't ready for enterprise solutions. Include demographics, pain points, goals, preferred communication channels, and buying behavior patterns."

Product battle cards and one-sheets

"Create a one-page battle card for our sales team comparing our CRM to Salesforce. Include: key differentiators, pricing advantages, implementation speed, customer support quality, and ideal use cases. Format as a quick-reference sheet with clear sections. Focus on objection handling and competitive positioning for deals under \$50K annual contract value."

Email campaign performance analysis

"Analyze this email campaign performance data and provide insights for improvement."

Campaign: 'Q4 Product Feature Launch' (4 emails sent over 2 weeks)

Audience: 15,000 existing customers

Email 1 - Announcement:

- Subject: 'Exciting new features coming your way'
- Sent: 15,000 | Delivered: 14,850 | Opened: 4,455 (30%) | Clicked: 445 (10% CTR) | Unsubscribed: 22

Email 2 - Feature Deep-dive:

- Subject: 'See how [Feature] can save you 5 hours per week'
- Sent: 14,828 | Delivered: 14,680 | Opened: 3,672 (25%) | Clicked: 734 (20% CTR) | Unsubscribed: 8

Email 3 - Customer Success Story:

- Subject: 'How TechCorp increased productivity by 40%'
- Sent: 14,820 | Delivered: 14,675 | Opened: 4,403 (30%) | Clicked: 1,057 (24% CTR) | Unsubscribed: 12

Email 4 - Limited-time Upgrade Offer:

- Subject: 'Last chance: Upgrade and save 25%'
- Sent: 14,808 | Delivered: 14,663 | Opened: 5,131 (35%) | Clicked: 1,540 (30% CTR) | Conversions: 85 | Unsubscribed: 45

Analyze: performance trends, what worked best, potential issues, and provide 5 specific recommendations for our next product launch campaign."

Customer journey mapping

"Map out the customer journey for our email marketing platform. Start from initial problem awareness through becoming a paying customer. Include: typical touchpoints, content they consume at each stage, common questions or objections, and opportunities for our sales team to add value. Focus on the 3-6 month buying cycle typical for marketing software purchases."

Turning one report into a multi-channel content campaign

One of AI's most powerful applications for marketers is taking a single high-value piece of content—like a research report, white paper, or industry study—and spinning it into an entire content campaign across multiple channels and formats. This approach maximizes your content investment while ensuring consistent messaging throughout your campaign.

The strategic approach

Instead of creating each piece of content from scratch, you can use AI to extract key insights, themes, and data points from your hero content, then adapt them for different audiences and platforms. This ensures consistency while optimizing for each channel's unique requirements.

Sample campaign: Forrester report activation

Source material: "How Today's Enterprises and Agencies Are Using AI to Power Their Media Buying Strategies" - Forrester Report

Campaign goal: Generate leads and position our company as a thought leader in AI-powered marketing technology

Content asset plan

web landing page

- **Purpose:** Lead capture hub for the report download
- **AI prompt:** "Create a compelling landing page that highlights the 3 most surprising findings from this Forrester report about AI in media buying. Include a benefits-focused headline, scannable bullet points of key insights, social proof from the research, and persuasive copy for the download form. Target audience is marketing directors at mid-market companies."

LinkedIn content series (5 posts over 2 weeks)

- Post 1: Attention-grabbing statistic with industry insight
- Post 2: "Myth vs. Reality" post debunking common AI misconceptions
- Post 3: Document carousel summarizing key findings
- Post 4: Question post driving engagement around AI adoption challenges
- Post 5: Thought leadership post on future implications

Instagram content (3 posts)

- Visual quote cards featuring compelling statistics
- Behind-the-scenes story about the report's creation process
- Carousel post with "5 Things You Didn't Know About AI in Media Buying"

Facebook content (2 posts)

- Educational post explaining AI media buying in simple terms
- Community question asking about followers' experiences with marketing AI

Blog series (3 posts)

- Blog 1: "The State of AI in Media Buying: What 500+ Marketers Told Forrester"
- Blog 2: "Why 67% of Agencies Are Still Struggling with AI Implementation"
- Blog 3: "Future-Proofing Your Media Strategy: Lessons from AI Early Adopters"

Infographic

- **Focus:** "5 Game-Changing Stats About AI in Media Buying"
- **Data points:** ROI improvements, adoption rates, common challenges, success factors, future predictions

Email campaign (4-email sequence)

- Email 1: Report announcement with teaser insights
- Email 2: Deep dive into one key finding with actionable takeaways
- Email 3: Case study or success story inspired by report data
- Email 4: Final reminder with exclusive additional resources

Sample AI prompts for each asset

Landing page prompt: "Using the attached Forrester report, create a landing page that converts marketing directors into leads. Focus on the three most actionable insights that would impact their daily work. Include a headline that emphasizes urgency or competitive advantage, 4-5 benefit bullets, and compelling download CTA copy. Reference specific statistics that prove ROI potential."

LinkedIn carousel prompt: "Create a 6-slide LinkedIn carousel summarizing this Forrester report's key findings. Slide 1: Hook with the most surprising statistic. Slides 2-5: One key insight per slide with supporting data. Slide 6: Call-to-action to download the full report. Keep each slide to 15 words or less with visual descriptions for each slide."

Blog series prompt: "Using this Forrester report, create an outline for a 3-part blog series. Each blog should focus on a different aspect: current state, challenges/barriers, and future opportunities. Include specific statistics, quotes, and actionable insights for each post. Target audience is marketing managers who are considering AI implementation but haven't started yet."

Email sequence prompt: "Design a 4-email nurture sequence for people who downloaded our Forrester report. Email 1: Thank you + key highlight. Email 2: Deep dive into [specific finding] with practical application. Email 3: Success story that reinforces report findings. Email 4: Next steps/consultation offer. Keep each email under 150 words with clear CTAs."

Execution strategy

- **Week 1:** Launch landing page, send announcement email, post LinkedIn teasers
- **Week 2-3:** Roll out blog series, continue social media content, send nurture emails
- **Week 4:** Release infographic, final email push, repurpose top-performing social content

Content calendar coordination: Use AI to ensure messaging consistency: "Review all these content pieces and ensure consistent messaging and tone. Flag any contradictions or opportunities to strengthen connections between pieces."

This approach transforms one piece of research into 15+ content assets while maintaining message consistency and maximizing your content investment. Each piece reinforces the others, creating a cohesive campaign that builds authority and drives conversions across multiple touchpoints.

8. UX-specific applications

AI use cases for UX and design teams

AI can be a valuable creative partner for UX and design professionals, helping streamline research, ideation, and documentation while enhancing the overall design process. These AI applications help UX teams work more efficiently while maintaining focus on user-centered design principles and evidence-based decision making.

User research and persona development

Persona research prompt: "Analyze these 15 user interview transcripts and identify the top 5 pain points mentioned across participants. Then create three distinct user personas based on the patterns you find, including demographics, goals, frustrations, and preferred solutions. Focus on actionable insights that could inform our product roadmap."

Information architecture and content strategy

Content architecture prompt: "Help me organize the navigation structure for our e-commerce website. We have these 47 product categories and need to group them into logical main sections that make sense to customers shopping for home improvement supplies. Suggest a hierarchy with primary navigation, subcategories, and rationale for the groupings."

Wireframe and prototype content creation

Prototype prompt: "Generate realistic placeholder content for our project management app wireframes. I need: 15 project names that sound authentic for different industries, 8-10 task descriptions of varying lengths, team member names and roles, and sample notification messages. Make it diverse and realistic enough that stakeholders can envision real usage scenarios."

Usability testing analysis and reporting

Testing analysis prompt: "Review these usability testing notes from 8 participants testing our checkout flow. Identify recurring issues, categorize problems by severity, and suggest specific design solutions for the top 3 most critical usability barriers. Present findings in a format suitable for sharing with developers and product managers."

Accessibility and inclusive design guidance

Accessibility prompt: "Audit this design for accessibility compliance and inclusive design principles. The target users include people with visual impairments, motor disabilities, and varying levels of digital literacy. Provide specific recommendations for color contrast, navigation improvements, and alternative interaction methods that would make this interface more accessible."

CTA and user journey copy optimization

Journey copy prompt: "I need compelling call-to-action copy for our SaaS onboarding flow. The user has just completed account setup and needs to take their first action to experience value. The next step is importing their existing data (contacts, projects, or files). Our users are small business owners who are typically hesitant about data migration and worried about losing information. Create 5 different CTA button texts and 3 supporting headline options that emphasize safety, ease, and quick value. The tone should be encouraging but not pushy—we want to reduce anxiety while creating momentum toward that first 'aha moment.'"

9. Quick reference & templates

The perfect prompt formula

Role + Context + Task + Audience + Format + Constraints

"You're a [ROLE] helping me [CONTEXT]. Create a [TASK] for [AUDIENCE] in [FORMAT] that [CONSTRAINTS]."

Starter templates you can customize

Research template: "Research [COMPANY/TOPIC] focusing on [SPECIFIC ANGLE]. I need this information for [PURPOSE]. Provide [NUMBER] key insights that would be relevant for [AUDIENCE/SITUATION]."

Content creation template: "Create [TYPE OF CONTENT] about [TOPIC] for [AUDIENCE]. The goal is to [OBJECTIVE]. Keep it [TONE] and [LENGTH]. Include [SPECIFIC REQUIREMENTS]."

Email template: "Write a [TYPE] email to [RECIPIENT DESCRIPTION] about [TOPIC]. Context: [BACKGROUND]. Goal: [WHAT YOU WANT TO ACHIEVE]. Tone should be [TONE] and length should be [LENGTH]."

Red flags to avoid

- **Being too vague:** "Write something good"
- **No context:** Jumping straight to the task without background
- **No audience specified:** AI can't match tone without knowing who it's for
- **Expecting perfection on first try:** Always plan to iterate
- **Forgetting your brand voice:** Include tone and style guidelines

Getting better results

1. **Start broad, then narrow:** Get the structure first, then refine details
2. **Ask for alternatives:** "Give me 3 different approaches"
3. **Request explanations:** "Why did you choose this approach?"
4. **Test and iterate:** Save prompts that work well for similar future tasks

Final thoughts

Remember, prompt engineering is a skill that improves with practice. Start with these templates and techniques, but don't be afraid to experiment. The best prompts are often the ones you develop based on your specific needs and workflow.

The key is to think of AI as a collaborative partner rather than a magic solution. The clearer and more strategic you are in your communication, the more valuable the assistance you'll receive.

Ready to transform your daily workflow? Start with one use case that would save you the most time, practice the prompting techniques we've covered, and gradually expand from there.

Your future self will thank you for the hours you get back.

For more information about prompt engineering, how to successfully integrate AI tools and solutions for your team, and all other content needs, contact:

Christopher Ransom

ransomesque@gmail.com

<https://www.authory.com/ChristopherRansom>