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**PROMPT ENGINEERING: The R-STAR<sup>SM</sup>  
and DR-SCOTT-D<sup>SM</sup> Methods for  
Effectively Generating Prompts for YOUR  
ChatGPT-3.5/GPT-4 Queries**



## [Dr. Scott Dell, CPA, CPC, DBA \(he, him, his\)](#) 🇺🇸 🌐

🏆 Award-Winning Academic ✓ Passionate Career Educator ✓ ChatGPT/AI Keynote  
✓ LinkedIn Advocate/Author/Trainer ✓ Translating Accounting into English ✓ Helping  
YOU ✨ Learn/Grow/Succeed 💰 ...and Get HIRED 🚀

May 3, 2023

### **Prompt Engineering – The R-STAR<sup>SM</sup> Method for effectively questioning your AI Chatbot**

As a fan and keynote speaker on the hopes, risks, fears, and opportunities of this powerful technology, I have often been asked to assist in effectively asking questions using this amazing tool. The following discussion highlights a system that I have found for prompting ChatGPT-3.5/GPT-4, effective in getting inspiring results from this tech. It also includes a sample of what I would consider a \$10,000+ consulting engagement response that was accomplished in less than two hours. Talk about a Return on Investment (ROI)! . Join us Monday for a live virtual session covering the Prompt Engineering content as described below. Details are:

**Special Announcement:** I will be presenting a virtual session discussing the content below, Monday May 8 at 10:30 EDT. Free live virtual one-hour session on this very topic! INCLUDES FREE CPE. Sponsored by Miles Education, you can register directly at <https://www.linkedin.com/events/7060035131138314240/about/>:



## Chat GPT 2: Mastering Prompt Engineering for Enhanced Business Success

1 CPE Credit

Field of Study

Information Technology

Fee = \$0



Monday  
**MAY 8**



**8 PM IST**  
**10:30 AM EST**

**Dr. Scott Dell, CPA, CPC, DBA**

Assistant Professor of Accounting at Francis Marion University

The above session is a "Part 2" seminar. If you would like to catch Part 1, which is more of an overview, the recording can be found at <https://tinyurl.com/MilesChatGPTRecording> (1:02:33)

I used to describe AI Chatbots like OpenAI's ChatGPT-3.5/GPT-4 as Google on steroids. I have since ceased using that description. It is so much more. With a Google search, you ask a question or make a request for information and you receive a prioritized listing, based on their algorithm, of resources with which you can do a deeper dive. The onus is on you to figure out the answers to your query based on the resources provided. With AI Chatbots, the opportunities, despite the potential of hallucinations (falsehoods), allow you to have a conversation to access the desired information. That is so much more powerful than a typical search engine's single question. It gives you the opportunity to produce customized results based on continued interrogation. How you prepare these questions is key to obtaining quality results. We will walk you through a model that allows you to effectively ask ChatGPT for help.

***“You can tell whether a man is clever by his answers,  
you can tell whether a man is wise by his questions”***

**Naguib Mahfouz – Writer/Nobel Laureate**

I envision that each one of us will soon (won't define soon here) have a personal virtual assistant that we can have a conversation with to enhance our personal and professional lives (has anyone seen the movie "Her"?). Recent articles discuss how Amazon is working to enhance Alexa through Lex to possibly do just that. And they are not the only ones in the race. But let's focus on techniques that will allow you to maximize your current benefits from this technology.

BTW, if you are looking for an introduction to the technology, I recently presented for the Miles Education group an intro educational seminar on ChatGPT which can be found at <https://tinyurl.com/MilesChatGPTRecording> (1:02:33). In addition to previous presentations, including the keynote at the AICPA & CIMA's 5th Global Academic Champion Forum, this summer I will be presenting at the national IMA Conference this June in Minneapolis, keynoting for the South Carolina Association of Colleges and Employers (SCACE), presenting at both the National Association of Colleges and Employers (NACE) Orlando conference and in Denver at the American Accounting Association (AAA) annual meeting. Additionally, I will be making a series of virtual presentations on the topic of AI. If you plan on participating in any of the above events, please let me know. Would love to catch up!

Warning: "Danger Will Robinson, Danger!" There are many warnings about the future adverse impact of AI. You might find a recent YouTube video by Tristan Harris and Aza Raskin, the creatives behind the Netflix film "The Social Dilemma", introduced by Steve Wozniak, titled "The AI Dilemma" at <https://www.youtube.com/watch?v=xoVJKj8lcNQ> (1:07:30). A penetrating quote from the video included results of a study August 2022 AI Impacts survey by researchers (n=738) "50% of AI researchers believe there's a 10% or greater chance that humans go extinct from our inability to control AI"

Personally, I am optimistic in the ability of this technology to change our society in a positive way and that humanity can and will adapt the technology to improve our world. Being aware that things may go in another direction can help us to ultimately avert such potential challenges.

I am going to share a jaw dropping experience that I had in applying this technology. I have used the technology in the classroom with the goal of helping my students think critically about the technology and what might be considered appropriate and inappropriate use in enhancing their education. I have used it with clients and my own business to improve product and service offerings, as well as creating materials that enhance the effectiveness of my communications. As I mentioned above about the creation of a \$10K consulting report, the following prompts and responses will highlight the process to build a meaningful prompt and provide follow up queries for the preparation of a marketing plan.

I have created two methodologies to help develop a prompts that could aid in your own prompt generation endeavors. The role of Prompt Engineer is a legitimate job title, and some are earning over \$300K annually in this role. I do wonder if this is a long-term opportunity, as eventually (and even currently), we can prompt AI tools to generate their own prompts to be more effective in the answers it gives. This is especially prevalent in generating prompts for generating images in Midjourney and Dall-E 2.

My overall strong belief is that this tool will augment a professional's ability to do their job EXPONENTIALLY, while this tool in the hands of a novice needs careful review of the results, as what might sound good conversationally may have major gaps and limitations. These tools when executed in the hands of a less experienced user or professional might cause the user to trust the tool's output blindly, or with less critical thought.

Here are two methods that can be used to help you think about the prompting process. The first model I call the DR-SCOTT-D<sup>SM</sup> Method. The second model I call the R-STAR<sup>SM</sup> Method. The first was created after lots of experimentation and with the direct assistance of ChatGPT-4. I use this actively in training sessions and helping colleagues and clients to develop their prompting skills. It is a comprehensive technique that I will

summarize below. Hopefully, this will give you some insights into the direction that you can take your prompts and types of questions you can ask.

**D**efine Objective – Know your Why BEFORE Typing First Word –  
What is your desired output?  
**R**ole – Identify Expertise/Background/Perspective Needed of the AI  
**S**pecify – Describe Goal of Output  
**C**larify – Include As Much Detailed Background Information as Possible –  
article to evaluate, text from sources, factual material to set the stage  
**O**utput – Show Samples and/or Describe Format of Expected Output  
**T**one – Establish the desired tone or slant that you would like the  
response oriented – could be a person, methodology, system, or style  
**T**arget – Describe target audience/avatar for who this is meant/  
  
Bonus: **D**ialog – Take a deeper dive by conversing/pursuing specific  
elements further

DR-SCOTT-D (sm) Prompting Method

I will go into more detail and apply the second method in this newsletter. It is a simplified version of the first method. The R-STAR<sup>SM</sup> Method, reminding me of the lyrics from Nickelback song *Rockstar* "Hmm, hey, hey, I wanna be a R-Star," and stands for Role-Situation-Task-Action-Result. You might recognize some of the elements that are often used to answer a behavioral interview question. We are similarly seeking answers for how to solve a problem or initiate an action plan.

I will demonstrate its use with actual results that GPT-4 creates. My draw dropped to the floor when I first saw the results. I would value your feedback as you examine the process and the output. Again, I do want to mention that the quality of output is directly proportional to the quality of the prompt. If you write a one or two sentence request let's say to "Write a book about pursuing your passion and finding a career", which I have done, you get a very vanilla and shallow 25 chapter result that does have some good ideas to springboard forward from, but does not have the depth worthy of a finished and usable book. Our upcoming book with the running title "My Career Compass: Finding and Living the Dream" goes into a lot more depth 😊.

Let's go ahead and walk through the R-STAR<sup>SM</sup> system in generating a marketing plan. Here's the situation. We are a regional CPA firm looking to expand our practice seeking specific goals to accomplish. The following might be an appropriate series of questions to ask of a consulting firm related to "Could you please develop a marketing plan enhance and grow my accounting practice?"

Let's first start with the "R-ole".

We assign a ROLE that ChatGPT is to emulate so it has a "feel" for the base of knowledge and experience from which to draw. You may want to precede this request with "Ignore everything before this prompt" to clear out ChatGPT's memory.

*Ex. "You are a marketing director with 20 years of experience in helping small and medium size service firms develop marketing programs that result in massive increases in business expanding a company's market share regionally."*

Then highlight the "S-ituation"

We alert the system to the current environment giving it a base of information so that it can "understand" the landscape.

*Ex. "We are an accounting firm with specialties in tax, audit, and implementation of accounting and office automation systems [insert additional background information from promotional material, web site, brochures, bios, mission, vision, values]. We are finding it challenging to grow our practice outside of our immediate area."*

Proceed to address the "T-ask"

Clarity for what the goal is that will provide a direction the tool can "envision" and help with.

*Ex. "We need to design a step-by-step marketing plan to show us the path to growing our market share and accounting practice. We are seeking to double our revenues over the next three years focusing on our core strengths as previously described."*

Express the "A-ction" desired

We need to be specific as to what we are looking for in the response

Ex. *"You are to provide us with a program of action that will lead us to our desired result. These actions should be in a step-by-step format with detailed instructions as to how to implement. For each step, you are to suggest a tag line and a paragraph of potential ad copy that could be used in a brochure."*

Finally the output or "R-esult" is requested

The expected results you want in the response, based on the previous information, should also be clear. Giving sample result formats can be very helpful. Also describe the type of output desired such as tables with columns A-B-C, lists, timetable, in an outline format, simple to follow, step-by-step, in a thousand words or less, in three paragraphs, bullet-pointed list, etc.

Add "Ask me questions before you answer", "Explain your thinking"

Ex. *"Given a specific plan you develop and present, you also need to develop an action plan with a specific timeline that can be implemented over a 30-day period. These actions need to include a step-by-step process with which to achieve our goal of doubling sales of the services we provide while keeping a client focus."*

If we combine all of the Example prompts above, we get:

***You are a marketing director with 20 years of experience in helping small and medium size service firms develop marketing programs that result in massive increases in business expanding a company's market share regionally. We are an accounting firm with specialties in tax, audit, and implementation of accounting and office automation systems. We are finding it challenging to grow our practice outside of our immediate area. We need to design a step-by-step marketing plan to show us the path to growing our market share and accounting practice. We are seeking to double our revenues over the next three years focusing on our core strengths as previously described. You are to provide us with a program of action***



**that will lead us to our desired result. These actions should be in a step-by-step format with detailed instructions as to how to implement. For each step, you are to suggest a tag line and a paragraph of potential ad copy that could be used in a brochure. Given a specific plan you develop and present, you also need to develop an action plan with a specific timeline that can be implemented over a 30-day period. These actions need to include a step-by-step process with which to achieve our goal of doubling sales of the services we provide while keeping a client focus.**

I will provide a link to the actual results in case you do not yet have access to GPT-4, but the 10-page output, when combined with follow up questions, was AMAZING. You can see the output at <https://tinyurl.com/GPTCPAMarketingPlan>.

The initial output to the above request started the following:

Partial Response: *Step 1: Define Your Target Market Tagline: "Discover Your Ideal Client" Ad copy: "Our team of experts will analyze your business, identify your ideal client profile, and tailor a marketing strategy specifically designed to reach and engage the people who need your accounting services the most. With our guidance, you'll be able to hone in on your core strengths and deliver the best possible solutions to your target market."*

*Step 2: Develop a Unique Selling Proposition (USP) Tagline: "Stand Out From the Crowd" Ad copy: "In today's competitive marketplace, it's essential to differentiate your accounting services from the rest. Our marketing experts will work with you to create a unique selling proposition that highlights your firm's specialties and demonstrates the value you bring to your clients. With a compelling USP, you'll attract the right clients and grow your business with confidence."*

*Step 3: Create a Brand Identity Tagline: "Establish Your Accounting Authority" Ad copy: "A strong brand identity is crucial for establishing trust and credibility with your clients. We'll help you create a professional and consistent look across all your marketing materials, from your logo to your website, ensuring your firm stands out as a leader in tax, audit, and accounting automation services."*

*Step 4: Develop a Content Marketing Strategy Tagline: "Share Your Expertise, Grow Your Practice" Ad copy: "Our content marketing strategies will position your accounting firm as an industry thought leader, attracting new clients and strengthening relationships with*

*existing ones. From informative blog posts to engaging social media updates, we'll provide a comprehensive plan to showcase your expertise and increase your visibility."*

*30-Day Action Plan: Week 1:*

*Meet with your team to define your target market and ideal client profile.*

*Research competitors and identify opportunities for differentiation.*

*Begin brainstorming your unique selling proposition.*

Follow-up prompts included:

***For each of the taglines suggested above, propose three more using alliteration.***

Partial Response: *Step 1: Define Your Target Market Original Tagline: "Discover Your Ideal Client" Alliterative Taglines:*

*"Clarify Your Clientele"*

*"Client Clarity: Capture Your Market"*

*"Pinpointing Your Perfect Prospects"*

*Step 2: Develop a Unique Selling Proposition (USP) Original Tagline: "Stand Out From the Crowd" Alliterative Taglines:*

*"Distinguish, Differentiate, Dominate"*

*"Master Your Market Message"*

*"Uniquely Uplifting Your USP"*

*Step 3: Create a Brand Identity Original Tagline: "Establish Your Accounting Authority" Alliterative Taglines:*

*"Bold Branding Builds Business"*

*"Cultivate a Captivating Corporate Image"*

*"Forge a Formidable Financial Brand"*

*Step 4: Develop a Content Marketing Strategy Original Tagline: "Share Your Expertise, Grow Your Practice" Alliterative Taglines:*

*"Educate, Engage, Expand"*

*"Showcase Skill, Secure Success"*

NOTE: I especially liked the first items for Step 2 and Step 4.

Additional prompt: **For each step, give a more detailed plan of action with ten concrete action items to achieve each step**

Partial Response (ultimately included 25 steps):

*Step 1: Define Your Target Market Action Items:*

*Analyze your current client base to identify patterns and shared characteristics.*

*Conduct market research to identify potential new client segments.*

*Define your ideal client persona, including demographics, psychographics, and pain points.*

*Determine the geographic reach of your target market.*

*Evaluate the size and growth potential of your target market.*

*Understand the specific accounting needs of your target market.*

*Identify the most effective communication channels to reach your target market.*

*Create a list of potential referral sources within your target market.*

*Assess your competitors' market positioning and target audiences.*

*Establish key performance indicators (KPIs) to measure your success in reaching your target market.*

*Step 2: Develop a Unique Selling Proposition (USP) Action Items:*

*Identify the core strengths of your accounting firm.*

*Survey current clients to understand the factors that drive their loyalty.*

*Analyze competitor offerings and pinpoint areas where your firm can excel.*

*Develop a clear, concise statement that summarizes your USP.*

*Test your USP statement with a focus group or through market research.*

*Align your firm's internal processes and service delivery with your USP.*

*Train your team to communicate the USP effectively to prospects.*

*Incorporate your USP into all marketing materials and communications.*

*Ensure that your USP addresses the specific pain points of your target market.*

*Continuously refine and update your USP based on client feedback and industry trends.*

*Step 3: Create a Brand Identity Action Items:*

*Establish your brand values and mission statement.*

*Develop a consistent color scheme, typography, and logo to represent your brand.*

*Create brand guidelines to ensure consistency across all marketing materials.*

*Update your website design to reflect your brand identity and USP.*

*Implement branded email signatures and templates for internal and external communications.*

*Design branded social media profiles and cover images.*

*Create a library of branded visual assets for use in marketing materials.*

*Train your team to communicate your brand identity effectively.*

*Monitor your brand reputation and address any negative feedback promptly.*

*Periodically review and update your brand identity to ensure it remains relevant and engaging.*

NOTE: For all 25 steps, go to link previously provided

Prompt: **You have given me a lot of steps. What are the ten top priorities you would suggest that could be quickly accomplished that would put us on the path to effectively meeting our goals as previously described?**

Response:

Here are the top 10 priority action items that can be quickly accomplished to effectively meet your goals:

1. Develop a clear value proposition: Clearly define and articulate the unique value your firm provides to clients, focusing on your core strengths in tax, audit, and accounting automation systems.
2. Optimize your website: Ensure your website clearly communicates your value proposition, services, and expertise. Make it easy for potential clients to contact you and gather information about your firm.
3. Establish a strong online presence: Claim and optimize your firm's profiles on relevant review sites and social media platforms. Share valuable content and engage with your audience to showcase your expertise and build credibility.
4. Implement a targeted local SEO strategy: Focus on optimizing your website and online presence for local search terms related to your services, helping potential clients in your region find your firm more easily.
5. Strengthen your referral network: Reach out to your existing clients and partners to remind them of your services and ask for referrals. Provide them with easy-to-share materials and consider implementing a referral incentive program.
6. Develop and distribute valuable content: Create content, such as blog posts or whitepapers, that showcases your expertise and provides valuable information for

potential clients. Share this content across your online channels to attract and engage your target audience.

7. Leverage email marketing: Develop an email marketing campaign targeting your existing clients and prospects. Share valuable content, updates, and promotions to keep your firm top-of-mind and nurture relationships.
8. Attend local networking events: Participate in local networking events, industry conferences, and community gatherings to build relationships with potential clients and partners in your region.
9. Foster a client-centric approach: Focus on providing exceptional client service and ensuring your team members are trained in client communication and relationship-building best practices.
10. Track and analyze your marketing efforts: Regularly review the performance of your marketing initiatives, making data-driven adjustments as needed to optimize results and maximize your return on investment.

This conversation could have continued with requests for specific communications, emails, blogs, ads, and more with additional requests for further details on any of the proposed steps. I hope you can begin to see the power of what an effective prompting strategy, combined with appropriate follow-up questions can do. The 10-page report is only the beginning of an action plan. I would have estimated that a professional could have come up with something similar, or maybe even better, over a 3-5 day period (unless they were using a boilerplate). Even the GPT-4 response would need to be reviewed with a critical eye. Obviously, if I were a consultant or student, I would not just had in the report produced without editing and customizing.

I am still amazed daily by what this tool can do!

As you develop your prompting skills, some additional resources you might find useful can be found via the following links. If you discover more, or have additional insights, please do share in the comments below.

These additional prompting tools and resources can be found at: Tool and advice for exploring and creating prompts: <https://flowgpt.com/>

AI Prompt Generator: <https://gptforwork.com/tools/prompt-generator>

Interesting article with 5 tips:

<https://www.makeuseof.com/write-effective-chatgpt-prompts-for-ai-answers/>

100 Prompts for Marketing: <https://blog.hubspot.com/marketing/chatgpt-prompts>

Chrome add-in for prompting assistance: <https://www.aiprm.com/>

ChatGPT Cheat Sheet by: <https://attachments.convertkitcdn2.com/682688/b0c434c6-e836-49cf-864c-4c8c67d97625/ChatGPT%20Cheat%20Sheet.pdf>

LinkedIn Learning Course by Dave Birss using the C-R-E-A-T-E method (Character, Request, Examples, Additions, Type of Output, Extras):

<https://www.linkedin.com/learning/how-to-research-and-write-using-generative-ai-tools/meet-your-ai-creative-collaborator>

77 page prompt guide with the course: [https://davebirss.com/documents/the\\_prompt\\_guide.pdf](https://davebirss.com/documents/the_prompt_guide.pdf)

Hope you enjoy and can put these tools to great use.

We all need to stay ahead of the curve. Developing prompt engineering skills will help you do just that.

If you want to discuss further or would like to share insights, please feel free to reach out at <https://Calendly.com/DrScottCPA>.

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