NEW AND IMPROVED

AI Accelerator 2.0
Take it to the next level!

LEARN **AI** FOR BIZ

Wins from last week

What things did you try that really worked for you?

Questions from last week

What questions do you have?

How to get more info

Get the recordings.

◦ They will show up about 1-2 days later. Log into WBL site. Click on Resources. You will see Amy and Michelle at the top of the page. Scroll down to find the Accelerator.

Get the slides.

◦ Click the link in the Zoom Chat OR scan the QR code at the end of the session on the screen. You will be directed to download them. Same place each week.

Get the emails after each session.

◦ If you registered for or downloaded the slides, we will send you an email each week with more AI tips and a summary of the session.

Here's what you will learn today

Customization techniques

◦ All the ways you can customize ChatGPT

Using AI to do important things better

◦ Client insights, difficult conversations

The HACK and some cool new features

◦ Upload a file, Voice Mode

Customization

How to tell ChatGPT more about you so it becomes your 'mini me'.

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Customization

Critical to make ChatGPT sound like you

◦ People who customize their ChatGPT can create more authentic content

Within a Chat

◦ ChatGPT (and all AI's) remember everything in the chat as you keep adding prompts

Using the Customization boxes

◦ Anything you put in the Customization boxes will be used across all the chats

Using memory

◦ Anything in memory is used across all chats.
◦ ChatGPT adds things on its own
◦ You can force it to add things.

Customizing a Chat
How to give ChatGPT information and not have it do anything

Persona

Backstory

Task
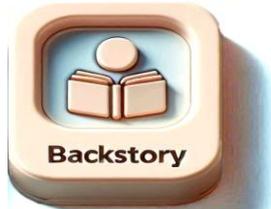
Here is some information about my clients who are younger. They care about buying their dream home, saving for their children's college education, taking vacations. They are concerned about how to save for these things and worried about what happens if they lose their jobs.

Wait for further instructions.

This assumes that somewhere you have told ChatGPT what you do: such as you are a financial advisor.

Want to know how? Schedule a FREE Discovery Chat.
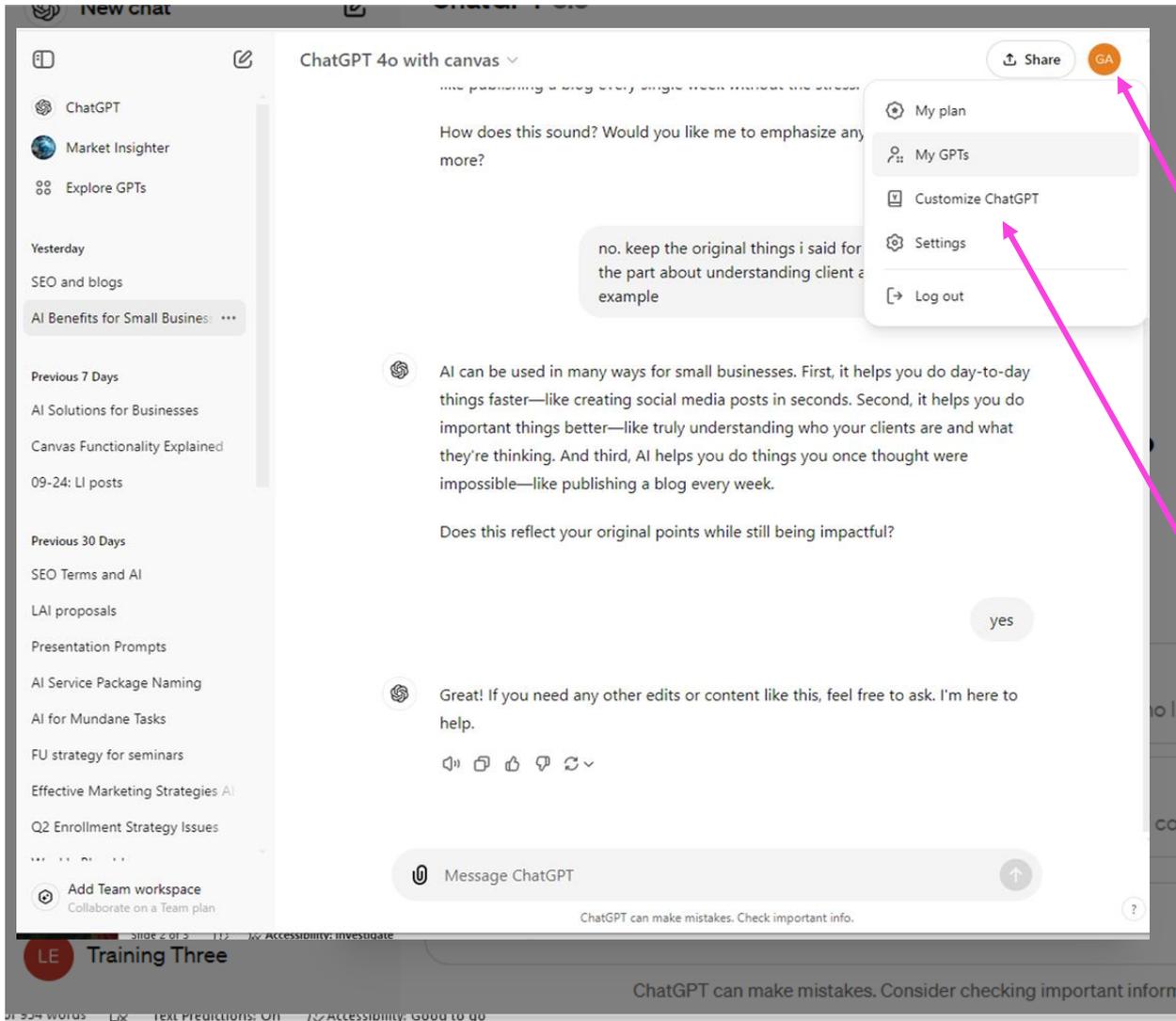
Customization boxes
for ChatGPT

1. Click on your initials in the upper right hand corner to get started and you will see this drop down menu.

2. Click on the Customize ChatGPT option
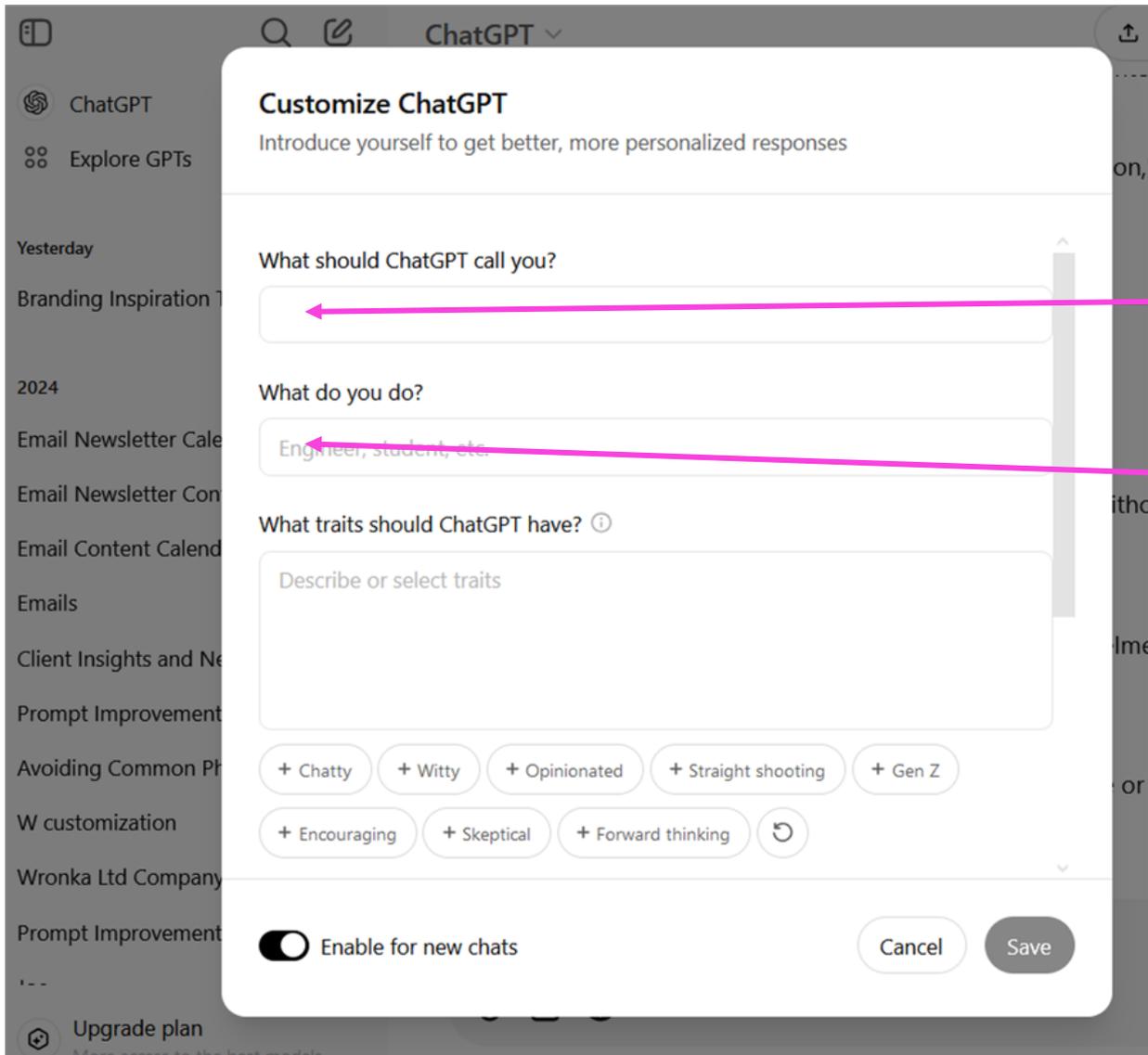
Customization boxes for ChatGPT

1. Type your name here

2. Put your business name here. You can put a sentence about what your business does.
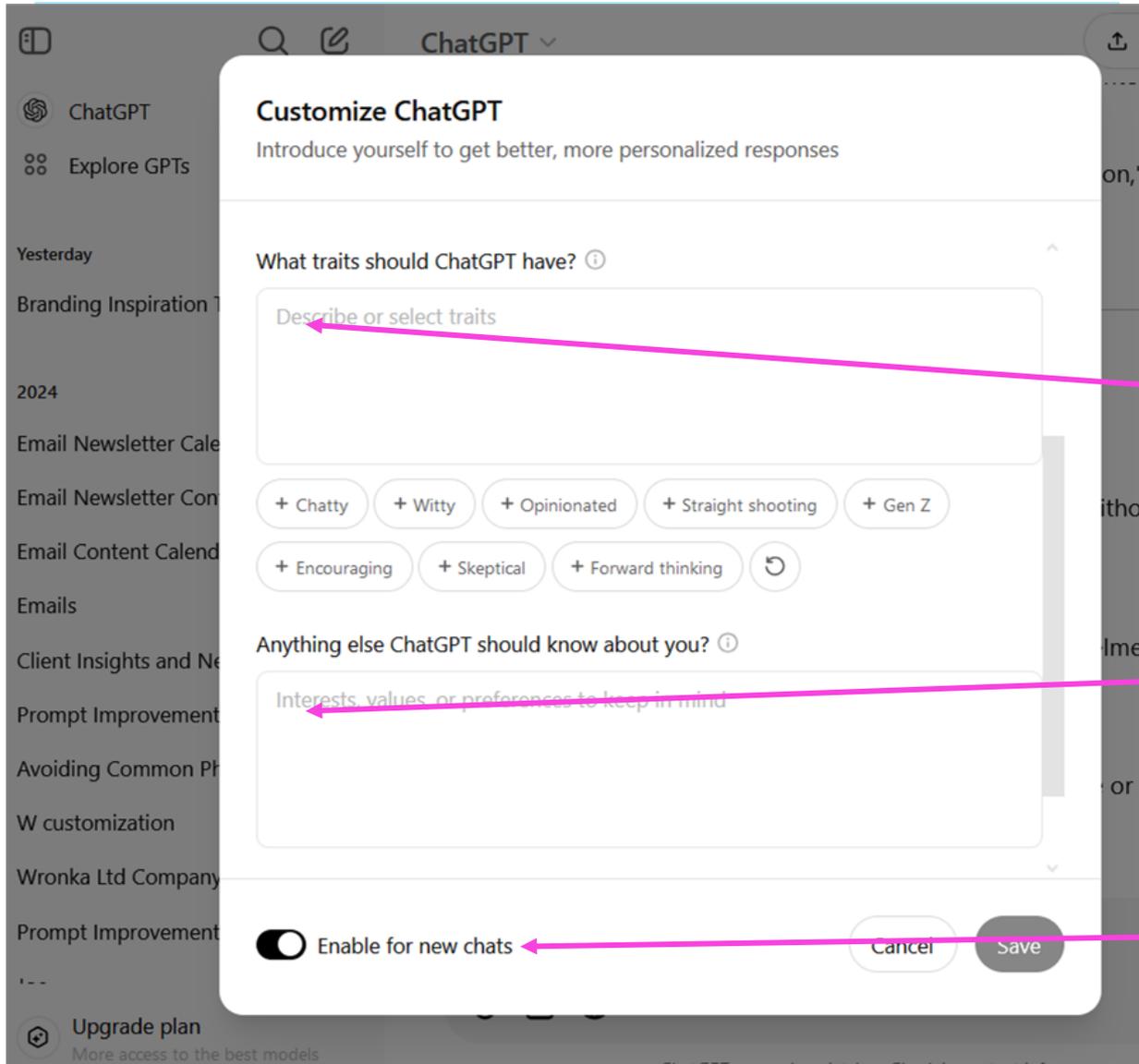
Customization boxes for ChatGPT

3. This is where your brand tone goes. You can click on the bubbles below as ideas or add your own. Limit is 1500 characters.

4. This is where the description about your business and clients goes. Limit is 1500 characters.

5. Be sure to Enable. Remember this will work for New Chats only, not for the ones you already did.

6. Then click Save.
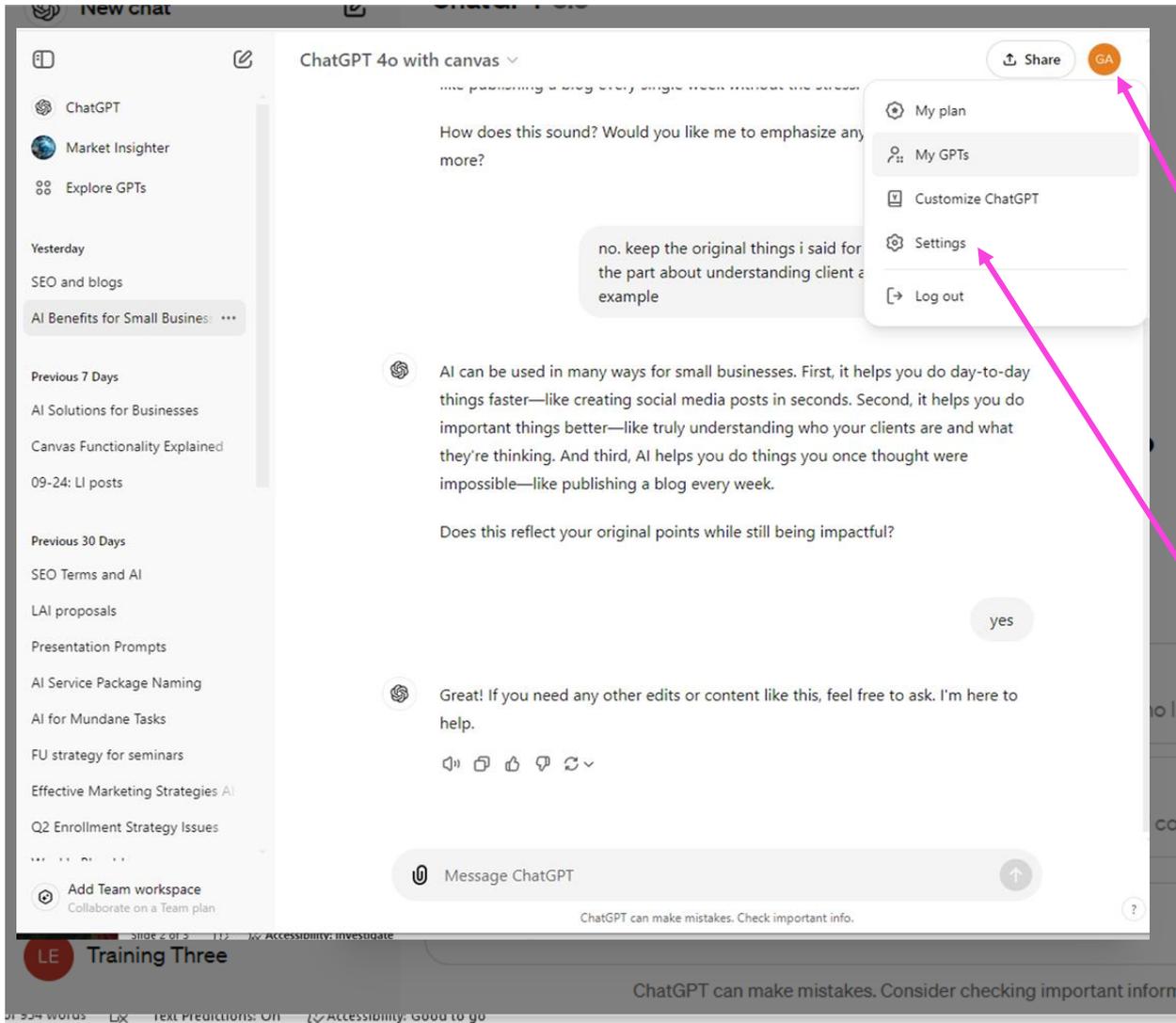
Memory
for ChatGPT

1. Click on your initials in the upper right hand corner to get started and you will see this drop down menu.

 2. Click on the Settings option

Memory
for ChatGPT
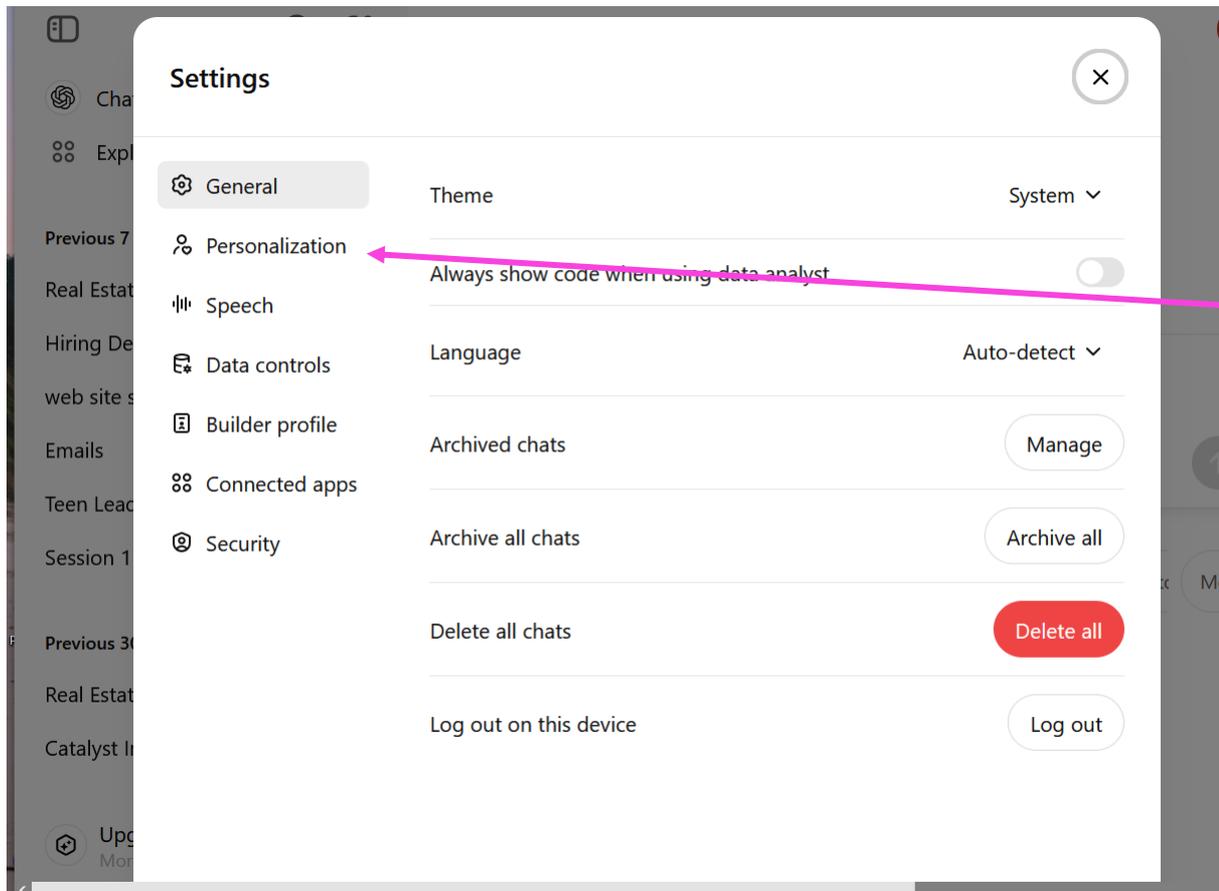
3. Click on the Personalization option

Memory
for ChatGPT

Settings ✕

- General
- **Personalization**
- Speech
- Data controls
- Builder profile
- Connected apps
- Security

Custom instructions   Off >

Memory   ⬤

ChatGPT will become more helpful as you chat, picking up on details and preferences to tailor its responses to you. Learn more

To understand what ChatGPT remembers or teach it something new, just chat with it:

- "Remember that I like concise responses."
- "I just got a puppy!"
- "What do you remember about me?"
- "Where did we leave off on my last project?"

Manage

Clear memories

4. Make sure the Memory is turned On.

5. Click on the Manage button

Memory
for ChatGPT

Memory   ✕

Lorraine is a leadership coach for teens in New England, specializing in helping parents of teens ages 12-16. She has 20 years of experience working with teens and focuses on building their confidence so they know their voice matters.   🗑

Lorraine wants engaging Instagram posts with a strong call to action.   🗑

Lorraine also does email marketing for a junk hauling and dumpster rental business serving residential clients in Manatee and Sarasota counties, Florida. Her clients are homeowners concerned about decluttering, downsizing, and moving. She wants her emails to be engaging, with strong calls to action and catchy subject lines.   🗑

Lorraine's business is a platform that helps people shop and sell locally, offering services and a storefront to artisans and boutiques to claim their fair share of the online market. She is considering hiring an additional person to do seller recruiting and corporate sales.   🗑

Clear memories

6. Click on the trash can to remove specific memories.

7. When you are finished examining memory, click on the 'x' to exit. Be sure NOT to click on the Clear Memories!

Note: Memory will fill up eventually. From time to time you might want to go in and delete things you don't care about.

Example of 'stuffing memory'

Persona

Backstory

Task

Search the website https://www.XXXX and summarize it.

Commit the information above to memory.

Whenever you have too much information to go into the Customization box, you can just Commit to Memory.

New Features and a HACK

New capabilities you can use for FREE, but for a limited time.

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The HACK

You can use some of the 'premium' features for a while in the FREE version

◦ Several of the premium features available in the paid version of ChatGPT, "ChatGPT Plus", are available in the FREE version

◦ BUT they are only available for a limited time each day

Current premium features you can use for FREE

◦ Upload a file, Voice Mode, Canvas (next session)

The 'limited time' part

◦ You get about 15 messages before it reverts back to the normal FREE version. Then it will give you a time later in the day when you can back and again use the premium features for a while.

◦ So plan your usage. Do the things that need those features first thing before it reverts back!

"Use Voice Mode" feature
New premium feature available for limited time each day
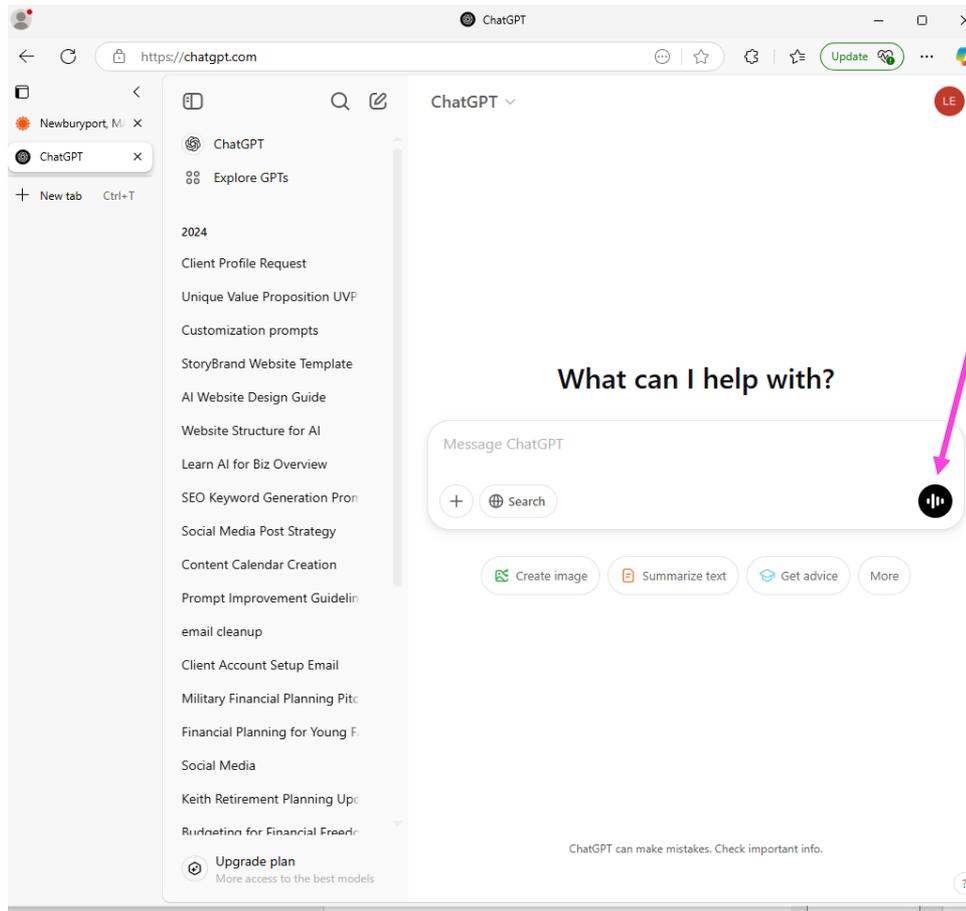
- Click on the black button with the lines

"Use Voice Mode" feature
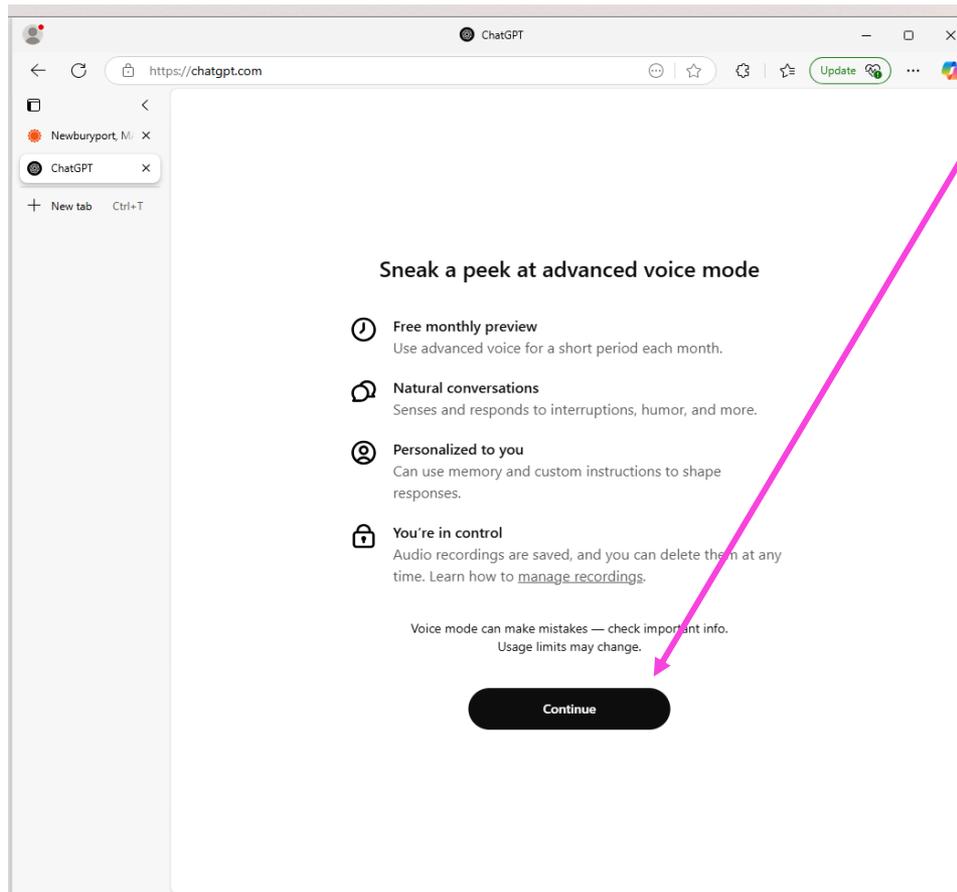
- This is what you see the first time you use it

"Use Voice Mode" feature
New premium feature available for limited time each day
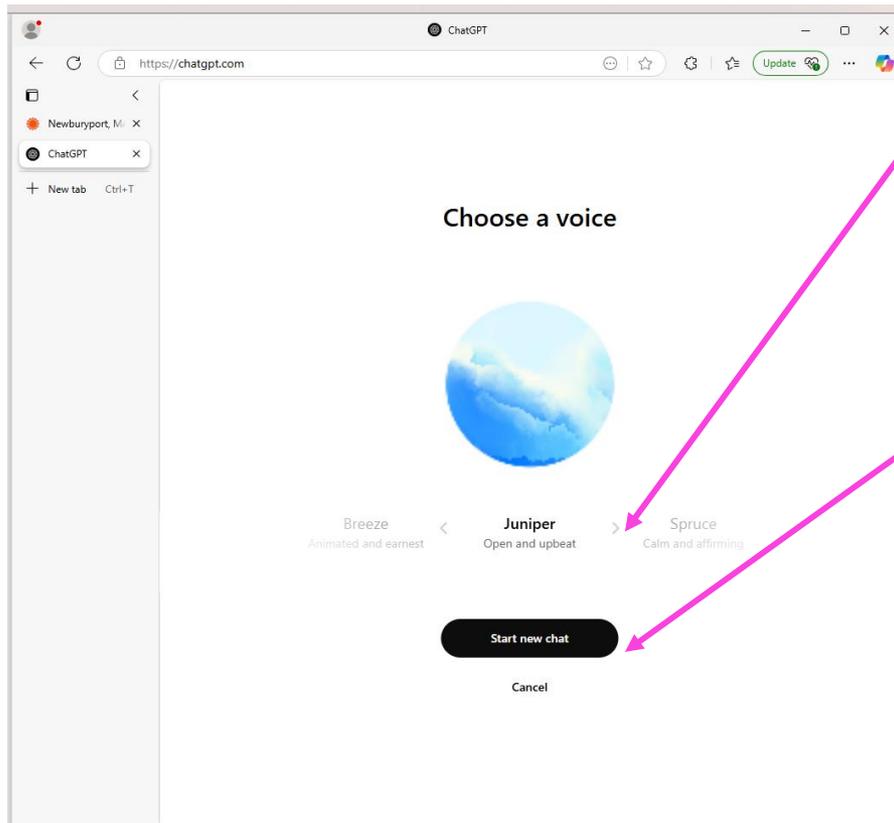
- Click on the arrows to find a voice you like.

- Then Click on the black button to start a new chat.

"Use Voice Mode" feature
Transcribing notes examples
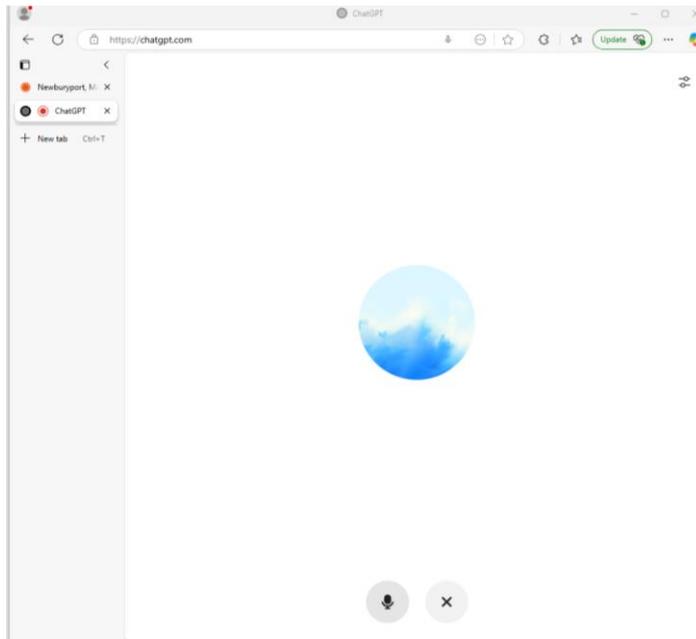
- When you see this screen, you can start speaking.
  - (The microphone button turns the microphone off.)
- Speak in your normal voice. You can give it input or commands.
- For transcribing notes
  - Read the notes from your handwritten ones. OK to embellish or add details as you go. Doesn't have to be in order.
  - Good to say 'End of meeting notes' when you are done
  - Then wait a few seconds and the Voice you chose will read the summarized and organized version back to you and then ask if there is anything else you want.
  - Click the x button.

"Use Voice Mode" feature
Transcribing notes example
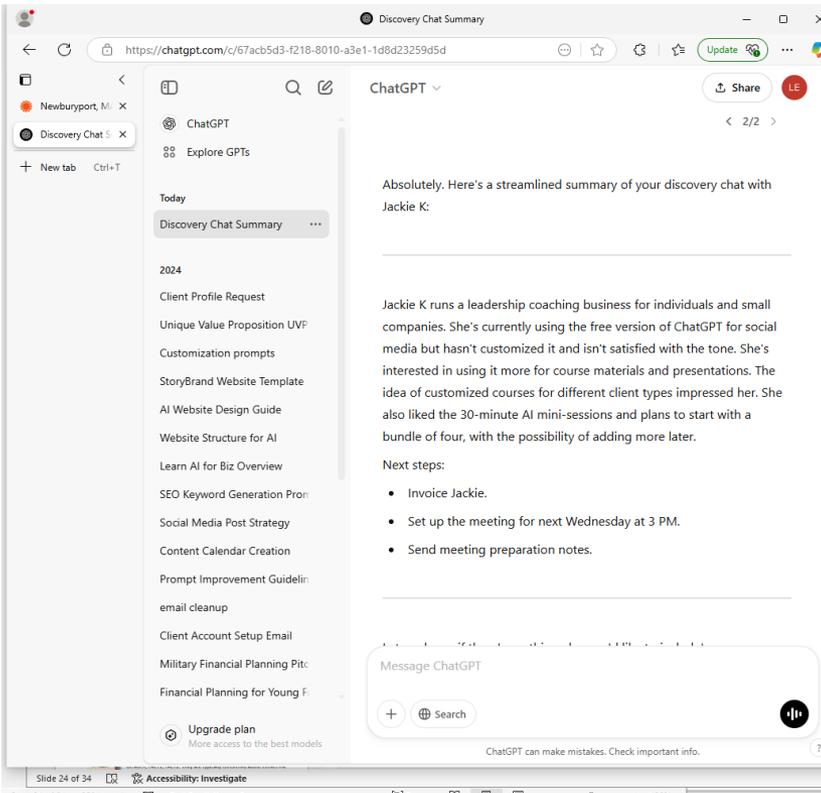
- After the voice window closes, here is the summary of your notes. At this point you can put it in a different chat for that client or for your prospect chats. Maybe put it into a word processing doc where you are keeping all the notes. Or use it to construct a follow up email!

- You can click the black button again and give it more commands to edit the text BUT you have to wait for it to read through the entire thing again before you click the 'x'. Otherwise it won't show you that text.

"File upload" feature
New premium feature available for limited time each day
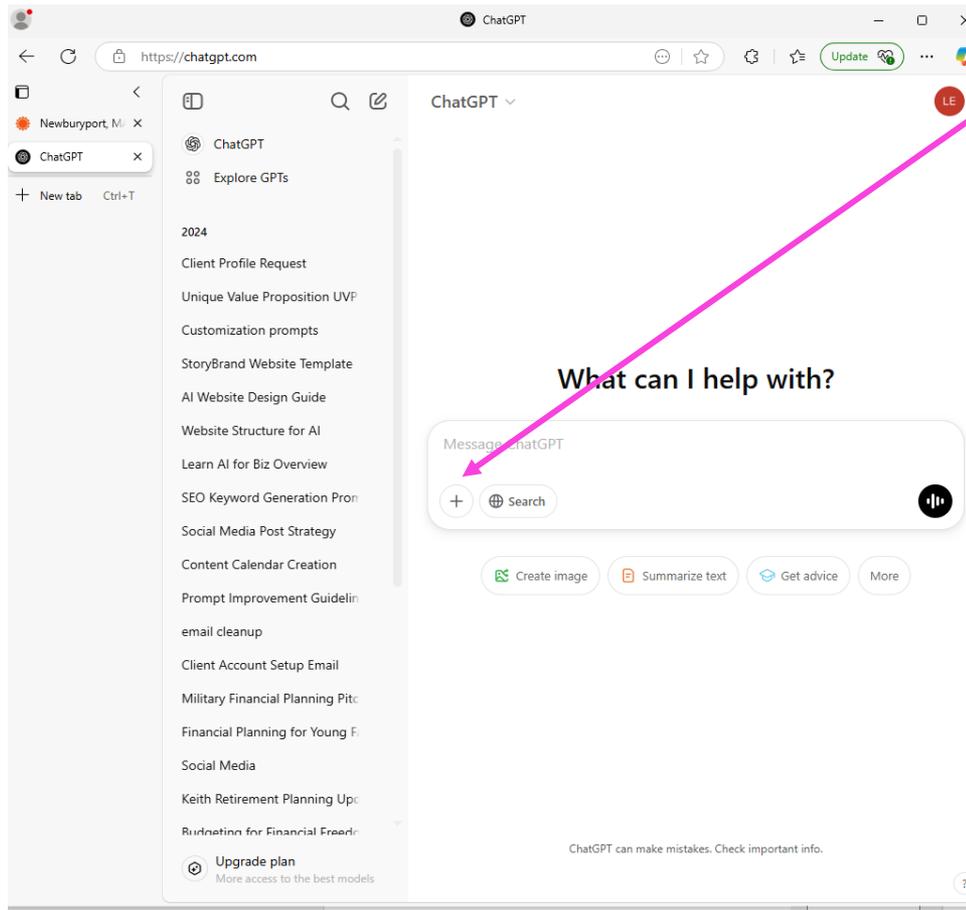
- Click on the '+' sign to start

"File upload" feature
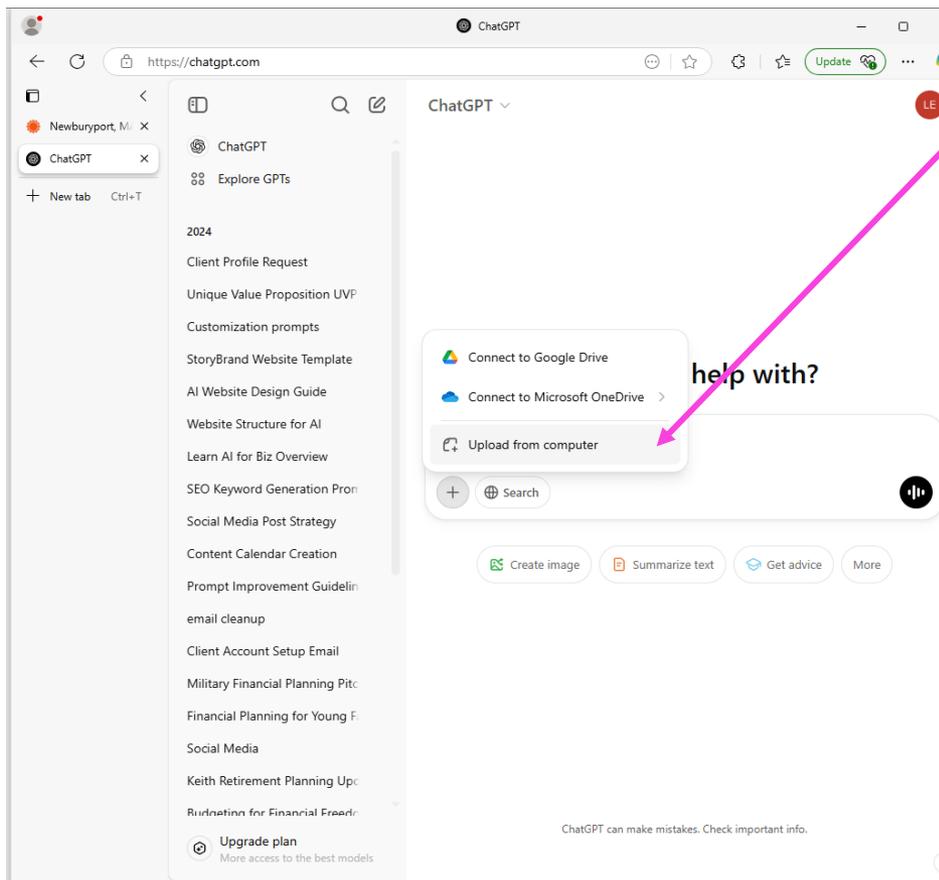
- Click on the source. In this case we are going to upload it from our computer.

"File upload" feature
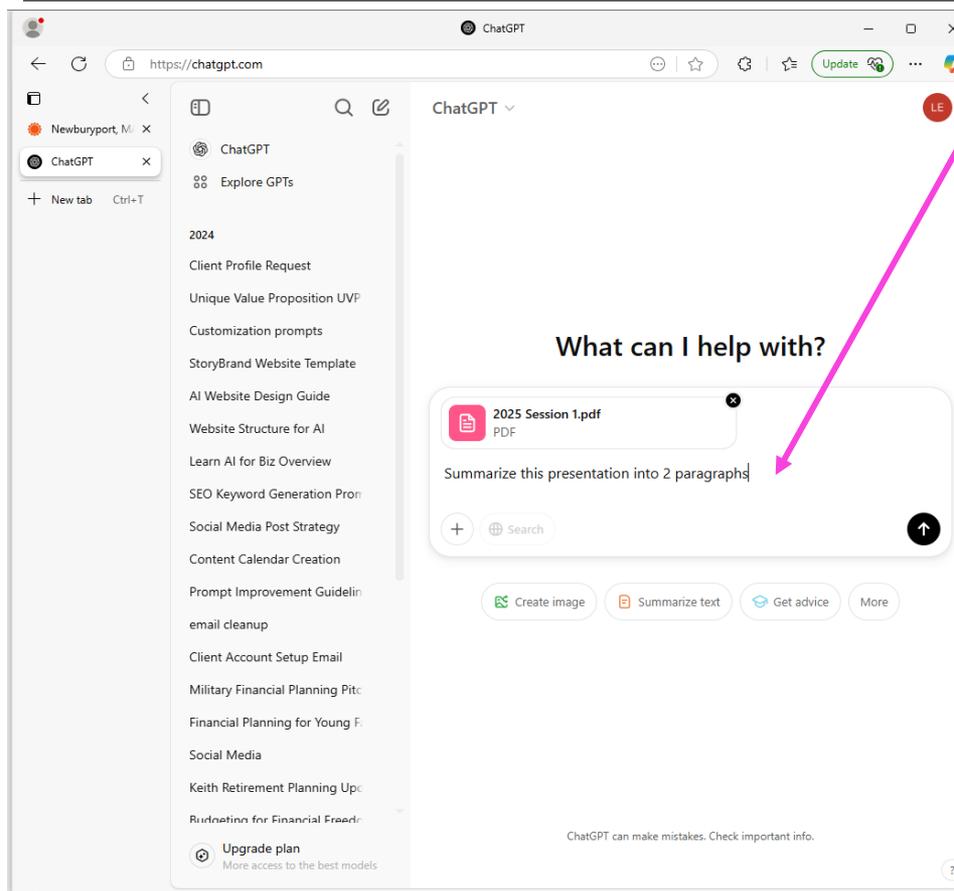
- You will get a normal file window and you can click into the proper directory to upload the file you want.
- Once it uploads you will see the little icon with the name of the file.
- Now just type in the prompt for whatever you want to do.
- In this case, ChatGPT will read the entire presentation in seconds (!) and summarize it into 2 paragraphs.

Use AI to do important things better

Client insights, difficult conversations

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Customer Insights
What do your clients *really* think?

Persona

You are a marketing and branding expert skilled in helping small INDUSTRY really connect with their clients.

Backstory

I want to learn more about what drives my clients and how I can relate to them better. My clients are: GENDER, AGES, PROFESSION, GEOGRAPHY, who NEED1, NEED2, NEED3. I provide SERVICE1, SERVICE2, and SERVICE3 to RESULTS. My specialty is SECRETSAUCE.

Task

What are the top 10 pain points that my customers have?

10 more.

This is the foundation for really using AI effectively. Once you do this you can not only dig deeper into who your clients are, but now you can work on more effective lead generation, appropriate products and services and upsells, pricing, and referrals.
Want to know how? Schedule a FREE Discovery Chat.

Difficult Conversations
What should I say?

Persona

You are a communications expert skilled in helping small businesses with client conversations.

Backstory

I have the following situation. XXXX [describe the people and the situation involved].
I am worried about XXXX.

Task

I want to achieve this goal: XXXX because XXXX
What are the best talking points for me to use in this situation?

Once you customize ChatGPT for your clients and/or employees, this becomes much easier. Always remember to tell it the 'why' to get better results.
Want to know how? Schedule a FREE Discovery Chat.

Discovery Chat and AI Mini Sessions

Discovery Chat

◦ I offer a free 30 minute Discovery Chat where we discuss how AI can specifically help YOUR business. We talk about what you are doing now and how AI can streamline that, make it easier and faster and I offer lots of suggestions about related things that you probably hadn't even thought of.

◦ Book any time by just emailing me.

AI Mini Sessions

◦ If you would like specific 1on1 help, I offer Mini Sessions.

◦ These are 30 minute sessions where you are using ChatGPT and I am 'looking over your shoulder' giving you prompts I prepared especially for you or guiding you exactly what prompts to use to get the results you want

◦ They are incredibly productive and have been hugely popular since I give you customized prompts and teach you how to use AI like an expert.

◦ We discuss how you might use these in the Discovery Chat

Next Steps

0. *Save the Zoom chat!*

1. *Get the slides.* **See the link in the chat and on the last slide.**

2. *Practice, practice, practice!*

3. **For Newbies: definitely try the Customer Insights prompt**

4. For more advanced users: try one of the new features like the Voice Mode.

Contact Info

FREE Discovery Chat with me:
gail@learnaiforbiz.com

Follow me on Linked In:
https://www.linkedin.com/in/gail-zona/

Learn more about our services:
https://www.learnaiforbiz.com

Gail Zona
Founder, Learn AI for Biz

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