

ChatGPT Setup for Success Resource Toolkit

Welcome to the ChatGPT Setup for Success Resource Toolkit! Whether you're brand new or just curious, this toolkit will help you learn how to use ChatGPT with clarity, confidence, and creativity.

Quick Start Guide

What Is ChatGPT?

An AI assistant that can help you write, plan, learn, and organize your life or business by simply chatting with it.

How to Start:

1. Go to chat.openai.com
 2. Create a free account or upgrade to Plus for extra features
 3. Start a conversation with a simple question or task
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Safe Use Reminder (Quick)

- Don't paste passwords, financial account numbers, or login info.
- Don't paste donor lists or client lists.
- Don't paste sensitive personal details (replace names with Client A, Donor B).
- If it's confidential, summarize it instead of pasting it.
- Always review before sending or publishing.
- When in doubt, keep it general.

Copy-Paste Notes Template (use with any prompt)

- What happened this week:
- Wins:
- Metrics:
- Problems or blockers:
- Decisions needed:
- Next steps:

Mini Example (quick fill):

- What happened this week: Partner meeting + program delivery
- Wins: Completed report draft, served 32 people
- Blockers: Vendor delay, one staff out
- Next steps: Follow-ups, finalize schedule

Prompting Cheat Sheet

Starter Prompt Formula (A.T.T.F.)

Act As: Who should ChatGPT pretend to be?

Task: What do you want it to do?

Tone: What style should it use?

Format: Bullet list, table, paragraph, checklist, etc.

Tip: Add 1–2 lines of context first (who it's for, deadline, and what success looks like).

5 Core Prompts for Busy Leaders (Use Weekly)

These prompts are designed to help nonprofit leaders and business owners save time, improve follow-through, and communicate clearly. Replace bracketed items, paste your notes, and reuse weekly.

1) Weekly Update Builder (one page)

Turn these notes into a one-page weekly update with headings and bullets: Wins, Metrics, Risks/Blockers, Decisions Needed, Next Week Priorities. Ask up to 3 questions if needed.

NOTES: [paste]

METRICS: [paste]

2) Meeting Notes → Action Tracker

Convert these notes into an action tracker table: Task, Owner, Due Date, Priority, Next Step. Then write a short recap message I can send to attendees.

NOTES: [paste]

3) Follow-Up Message Generator

Write 3 follow-ups for someone who has not responded: (1) friendly follow-up, (2) direct follow-up, (3) final check-in. Keep each under 100 words and include a clear call to action.

CONTEXT: [what you are following up about]

4) 7-Day Plan (COO Mode)

Act as my COO. Based on my notes, identify my top 3 priorities for the week, create a 7-day plan with a simple daily checklist, and list the 5 follow-ups I should send.

NOTES: [paste]

5) Rewrite for Clarity + Professional Tone

Rewrite this message to be clear, professional, and confident. Give me 2 versions: (1) warm and supportive, (2) direct and concise.

TEXT: [paste]

My #1 Workflow Rule

Draft → Refine → Finalize. Start with a draft, improve it for clarity and tone, then do a quick human review before sending or publishing.