

Today's goal is to learn the basics of using ChatGPT, then build one practical, reusable solution for your business.

# Getting started

# Responsible use of AI



Keep a human in the loop for important work



Obtain consent before sharing someone else's voice or data



Watch for bias and perspective



Know your data controls, and protect sensitive personal data



Seek expert review for legal, medical, or financial advice



Ask for sources when you need current answers

# How ChatGPT can help small businesses

Customer replies and follow-up

Hiring & onboarding

Planning & meeting prep

Marketing & promotions

File summaries & data analysis

Checklists, SOPs, and internal docs

**Start with one real task  
you already do every week.**

# Today, we'll focus on ChatGPT Plus — but first, a quick note on a few other tools in the OpenAI ecosystem



## ChatGPT Business

Shared tools, data, and admin controls for your team



## Codex

AI tool that helps you write and debug code



## OpenAI API

Build custom solutions connected to your data

# You're 1 minute away from using ChatGPT for real work.

## 01 Go to [chat.com](https://chat.com).

Use your browser, desktop or mobile device.

## 02 Sign-in

Make sure you're in the right account for this session.

## 03 Send your first message.

Try this prompt:

*I run a [type of business]. Give me 3 practical ways ChatGPT can help me save time this week.*

# Anatomy of a great prompt

## Task

What should  
ChatGPT do?

Write a clear customer  
update and an internal action  
plan for a delayed order.

## Context

What should  
ChatGPT know?

We are a small business in  
San Diego

A shipment is running late.

Customers are asking for  
updates.

We want to be clear, calm,  
and practical.

## Expectation

What should the  
answer look like?

Return:

1. a customer email
2. a 30-second phone script
3. a 5-step internal checklist

## Okay

Task

Help me hire a front-line employee.



## Better

Task + context

Help me hire a front-line employee for a small business.

We need someone reliable, customer-friendly, and comfortable with a fast-paced environment.



## Best

Task + context + output

Help me hire a front-line employee for a small business in San Diego. We need someone reliable, customer-friendly, and comfortable with a fast-paced environment.

Write: 1) a job post; 2) a 20-min interview guide; 3) a first-week training checklist



5 MINUTES

# Pair Activity

Rewrite each prompt

Write marketing for my business.



Make me a flyer for this promo.



Respond to this negative review.




Make a plan to improve my business.

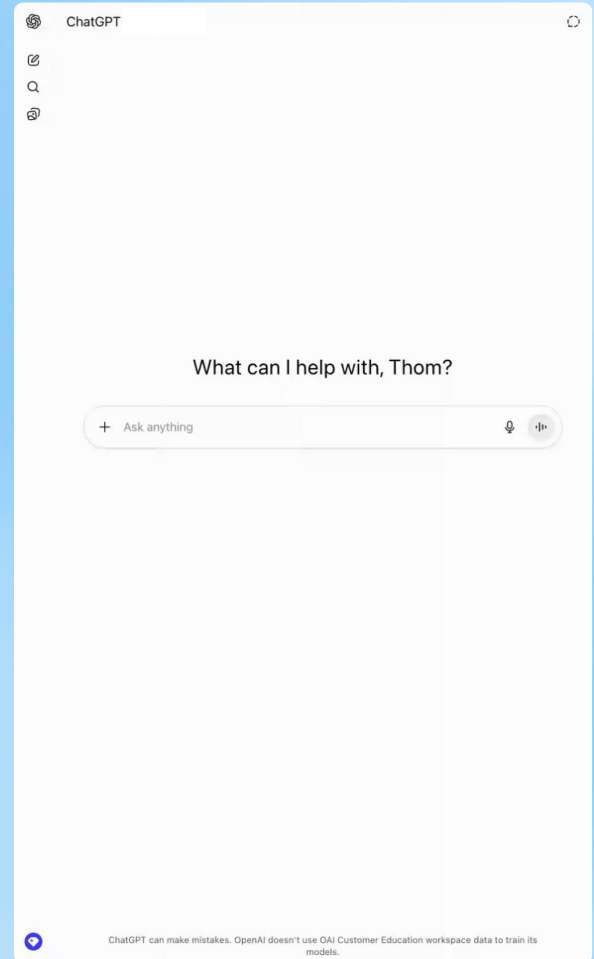


# Use ChatGPT to meta-prompt

Ask ChatGPT to help you write, refine, and adapt more effective prompts.

- ✔ Make this prompt clearer and more specific
- ✔ Rewrite this for a different audience or goal
- ✔ Turn this rough idea into a stronger prompt

 **Tip:** Start with voice dictation, then ask ChatGPT to turn your rough idea into a polished prompt.



# Models, tools, and capabilities

Analyze

Create

Automate

Collaborate

Learn

Research

Translate

Build

Code

Reason

Write

Speak

See

Interpret

Search

Read

Customize

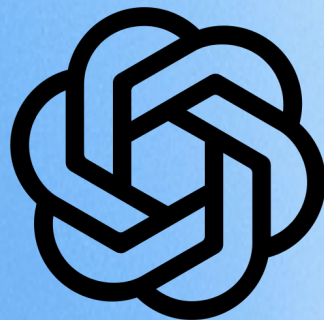
Personalize

Share

Organize

Schedule

Visualize



OpenAI

**with ChatGPT**

# Which model should I use?

## Auto

Best default for most everyday work

## Instant

Fast responses for everyday questions.

## Thinking

Better for more complex planning, analysis, and multi-step tasks

## Pro

Most advanced reasoning model for highest rigor or precision.



Tip: When in doubt, start with Auto.

# Tools you can use inside ChatGPT



**Tip**

*You do not need to master everything at once.*

*Start with chatting, then add tools as your use cases mature.*

## Get started with our core features

### ChatGPT Auto

Workhorse model

### ImageGen

Custom mockups + visuals

### Search

Access to the web

### Voice Mode

Speak to our models

### Data Analysis

Analyze documents & data

### Memory

Personalize ChatGPT based on your details

### Projects

Organize chats and maintain context

## Level up with more powerful tools

### Thinking & Pro

Multi-step reasoning

### Deep Research

Research & report generation

### Canvas

Interactive writing and coding

### Agent Mode

Have ChatGPT take actions on your behalf

### Apps

Connect your company's sources to ChatGPT

### Skills

Scale best practices across teams

### Custom GPTs

Create custom chat assistants

# Practical demos

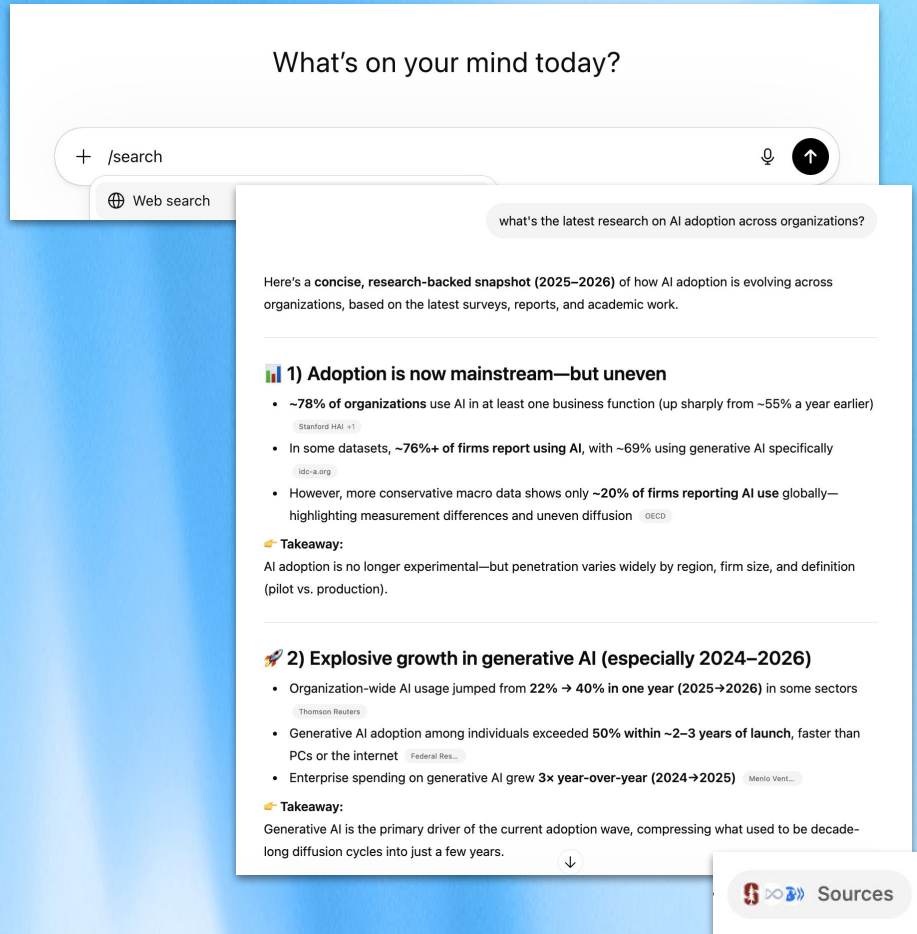
# Use **Search** for fast answers with links to relevant web sources

Use search to....



- Find current information with sources
- Compare peers or competitors
- Check claims before you act


 **Type `/search` in a new chat and try this prompt:**

*I run a [industry] business in [region].  
What are 3 current customer or market trends I  
should pay attention to this quarter?  
Use recent sources.*



What's on your mind today?

+ /search  

 Web search

what's the latest research on AI adoption across organizations?

Here's a **concise, research-backed snapshot (2025–2026)** of how AI adoption is evolving across organizations, based on the latest surveys, reports, and academic work.

**1) Adoption is now mainstream—but uneven**



- **~78% of organizations** use AI in at least one business function (up sharply from ~55% a year earlier) Stanford HAI <1>
- In some datasets, **~76%+ of firms report using AI**, with ~69% using generative AI specifically idc-a.org
- However, more conservative macro data shows only **~20% of firms reporting AI use** globally—highlighting measurement differences and uneven diffusion OECD

**Takeaway:**  
AI adoption is no longer experimental—but penetration varies widely by region, firm size, and definition (pilot vs. production).

**2) Explosive growth in generative AI (especially 2024–2026)**

- Organization-wide AI usage jumped from **22% → 40% in one year (2025→2026)** in some sectors Thomson Reuters
- Generative AI adoption among individuals exceeded **50% within ~2–3 years of launch**, faster than PCs or the internet Federal Res...
- Enterprise spending on generative AI grew **3x year-over-year (2024→2025)** Merito Vent...


**Takeaway:**  
Generative AI is the primary driver of the current adoption wave, compressing what used to be decade-long diffusion cycles into just a few years.

  Sources

# Analyze and visualize with Data Analysis

Use data analysis to....

- Understand what is in a file
- Spot patterns, outliers, and gaps
- Turn raw data into a chart and actions

 **Upload a dataset and try this prompt:**

*Analyze the uploaded file.*

*First tell me what the workbook contains, how clean it is, and what context is missing. Then identify the three most important business patterns, create one simple monthly chart, and recommend three actions the owner should test in the next 30 days. Separate observations from assumptions.*

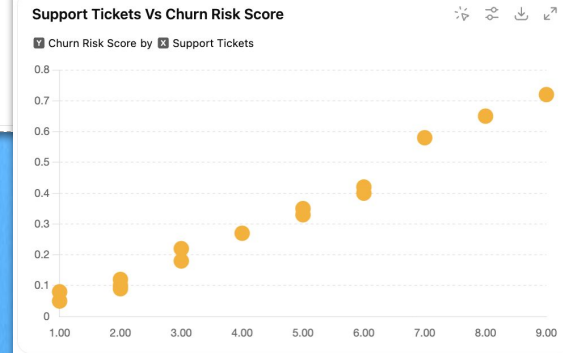
Saas Customer Data			
	customer_id	company	region
1	C001	Northwind Health	North America
2	C002	BluePeak Finance	North America
3	C003	Orchid Retail	Europe
4	C004	Zenith Manufacturing	Asia
5	C005	Evergreen Logistics	North America

Analyze the uploaded CSV and briefly describe its structure, key columns, and any data quality issues. Then summarize key insights, include one simple visualization of a major pattern, and end with the top 3 takeaways for a decision-maker.

## 1) Dataset structure

The file contains 15 customer records with 11 columns:

- **Identifiers & attributes**
  - customer\_id, company
- **Segmentation fields**
  - industry, region, plan
- **Time field**
  - start\_date (stored as text, not parsed as datetime)
- **Usage / engagement metrics**
  - monthly\_revenue
  - active\_users
  - logins\_per\_week
  - support\_tickets
- **Outcome / risk metric**
  - churn\_risk\_score (0-1 scale)



# Turn business inputs into usable outputs

Ask ChatGPT to:

- Draft customer-facing content.
- Build team checklists and SOPs.
- Create summaries and next-step plans.

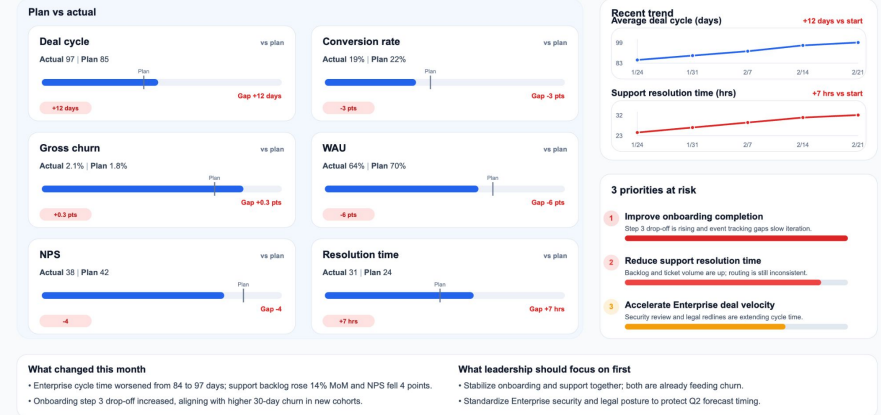


Try this prompt:

1. A customer-ready summary
2. An internal checklist
3. A short follow-up email

## Where performance is off plan

KPI snapshot • current vs plan • recent 5-week trend • priority risk ranking



Using the KPI data I already shared, create a simple one-page set of visuals that show where we are off plan.

Include:

- A Plan vs Actual chart for Deal Cycle, Conversion Rate, Gross Churn, WAU, NPS, and Resolution Time with the gap clearly labeled.
- A month over month trend line for Deal Cycle and Support Resolution Time.
- A simple visual that shows which of our 3 priorities are currently most at risk.

Then add 2 to 3 short bullets:

- What changed this month
- What leadership should focus on first

Keep it clean and presentation-ready.

I'm pulling the KPI file into a clean one-page visual and will keep the layout presentation-ready. First I'm checking the charting/export workflow and reading the KPI source.

I've got the slide workflow and the KPI file. Next I'm inspecting the workbook structure so I can build the chart data cleanly and keep the final slide to one page.

I've got the source metrics. I'm now building the slide layout so the off-plan items are readable at a glance, not buried in a dense table.

Thought for a second >

Done — the one-page slide deck is here:

kpi\_off\_plan\_dashboard.pptx

# Use **Apps** to bring your own business context into ChatGPT

Connect with Apps to...

- Get more relevant, specific answers
- Work from your real files, notes, and FAQs
- Create more useful outputs with less re-explaining



**Connect to your Calendar app and try this prompt:**

*What's on my calendar tomorrow and how should I prep?*

What's on my calendar tomorrow and how should I prep?

Thought for a few seconds >

Here's your calendar for tomorrow, Tuesday, March 24.

**Tomorrow**

**All day**

Office >  
Time: All day  
Location:  
Description:

**Morning**

Time	Title	Location
7:45 AM–8:45 AM	Commute >	
8:00 AM–9:00 AM	Executive WS	
8:00 AM–9:00 AM	FW: ChatGPT Enterprise Executive Training   Unlock Your AI Superpowers >	Virtual (Link in Description)
9:00 AM–10:00 AM	Product Learning Hour: Codex Roadmap updates & releases >	London-1-The Rolling Stones (16) [Google Meet,  Guests Allowed]
10:30 AM–11:00 AM	Dee / Lea	SFO-575-2-2.16-Lathe (2)  Guests Allowed]

**Afternoon**

Time	Title	Location
1:30 PM–2:00 PM	Lea / Sophie	

Ask anything

+ Google Calendar

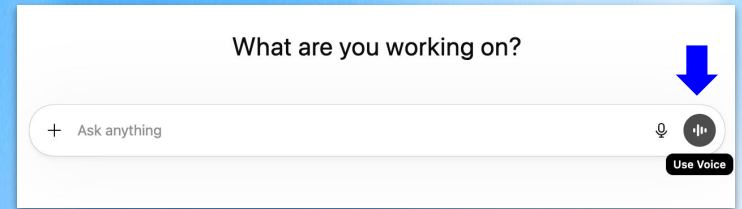
# Have a live conversation with ChatGPT through **Voice Mode**

Use voice mode to....

- Think out loud
- Work hands-free
- Turn rough thinking into a usable plan

 **Click on the Voice Mode button and say:**

Act as a live translator between English and Spanish. When you hear English, translate it into Spanish. When you hear Spanish, translate it into English. Keep the tone warm and professional. Do not add information or answer the customer's questions yourself.



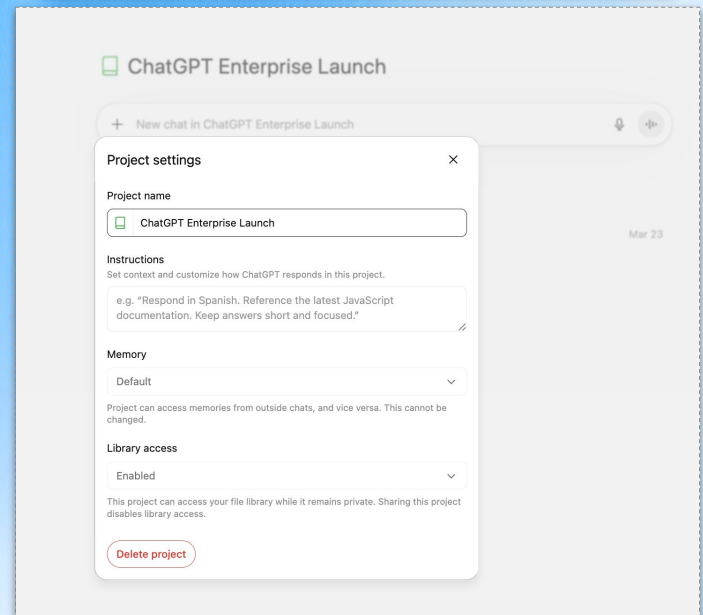
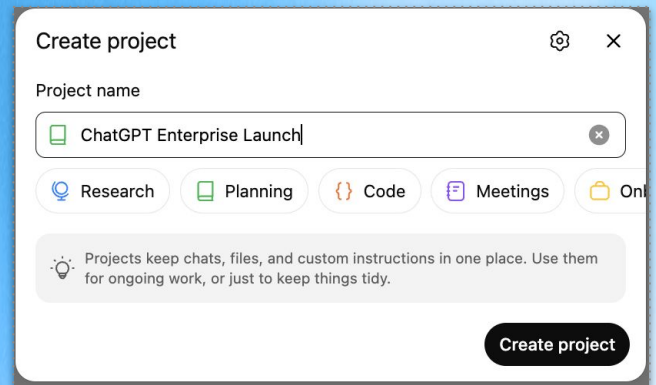
# Use **Projects** to organize work across your chats

Use Projects to...

- Keep chats, files, and instructions in one place
- Reduce repeated prompting
- Keep outputs more consistent over time

 **Find Projects in your sidebar and click new project:**

*Label it OpenAI Academy workshop and drag and drop some of your chats into it.*



# Part 2: Build a reusable assistant

# Vote: Which Agent should we build?

01

## Customer FAQ + reply assistant

Fast replies for email, SMS,  
and DMs using FAQs,  
policies, and tone guidance.

02

## Offer / proposal builder

Turn rough notes into a  
clear estimate, proposal, or  
customer-facing draft.

03

## Onboarding + training coach

Turn process notes and  
policies into checklists,  
onboarding help, and team  
guidance.

# Build recipe

01	<b>Define the job</b>	Who + when + what 'good' looks like
02	<b>Add context &amp; knowledge</b>	Your notes, policies, examples, files
03	<b>Specify the output</b>	Format, length, tone
04	<b>Add guardrails</b>	Do/don't, when to ask you
05	<b>Test for reliability</b>	5 test prompts / tasks

# Define the job

Who is it for?

When will they use it?

What job does it do?

What does success look like?

My assistant helps [**who?**] do [**job?**] by [**process?**].

# Add context and knowledge

**What content/assets** will the user paste/upload each time?

**What steps** should the assistant follow to produce the output?

**What questions** should it ask when key info is missing?

# What should the output look like?

Be explicit about structure, length, and tone.

Return a 6-line sign + a 120-word email + 1 SMS.



Return a table: Theme | Evidence | Fix | Owner | Effort.



Always include a quick 'human check' checklist.



# Add guardrails

- 
- Accuracy** Don't invent facts; ask clarifying questions

---

  - Safety** Don't include personal customer data

---

  - Style** Practical, concise, no hype

---

  - Human check** What must be verified before sending?

---

# Test for reliability

## Mark each pass/fail & fix what breaks

- 
- Normal case 1**

---

  - Normal case 2** What you expect most often

---

  - Normal case 3**

---

  - Edge case** Weird but possible

---

  - Missing info case** Forces it to ask questions

---

# Now it's your turn

## Pick the simplest format

If you're not sure, start in **Chat** or a **Project**.

### Chat / prompt pack

Prompts you can copy & paste.

**Best for**

When you're still exploring a range of tasks.

### Project

Workspace with your files + instructions

**Best for**

Staying organized and consistent while conducting related tasks

### Custom GPT

Reusable assistant for one job

**Best for**

One repeatable job with stable knowledge and a consistent output

### Data workflow

Analyze data from a range of sources

**Best for**

Spreadsheets, reports, reviews, and trends

**Goal:** Leave with one working v1 you can reuse next week.

30

20 MINUTES



# Individual Activity

Build your own v1

Scope the problem

Build a v1 using the Build Recipe

Test it

Save it

## Power-ups

31

Finished early? Try going up a level.

- Get sourced context with [Deep Research](#) ↗
- Pull live inputs from [Sharepoint / Google Drive](#) ↗

# Quick check-in

How is it going?

- What are you building?
- What's working?
- What's not?

# Iteration clinic

## Improve your v1

### **Tighten output format**

Make it easy to scan

### **Add guardrails**

No guessing; asking clarifying questions

### **Testing**

Add a 5-test set + pass/fail checklist

### **Add a knowledge file**

(FAQ, policies, menu, pricing notes, etc.) and retest



# Make it reliable

Iterate, improve,  
and polish

15 MINUTES



# Individual Activity

Improve, test, and save your solution

Definition of Done:

- Runs end-to-end
- The output is usable
- You've tested it
- You saved it

Improve your v1

Test and retest with each change

Fix what breaks

Save it

## Power-ups

35

Finished early? Try going up a level.

- Add a full eval: 3 normal cases, 1 edge case, 1 missing info case
- Add a tool: Search/Deep Research, Apps

# What did you build?

## **The problem**

What was the real pain point you chose?

## **The solution**

What does your AI-assisted process do now?

What format did you choose? Did you use any tools?

## **One result**

Describe the result or output of your process.

## **What's next?**

Share how you'd improve or level-up the tool you built, or what you want to make next.

Thank you