4-step AI context checklist

Give your AI chat context before you ask for a plan.

CHECK YOUR DOCUMENTS

- [ ] **Company document:** What you do, who you serve, products or services, prices and costs, team and budget, goals, and what is off limits.
- [ ] **Brand document:** Voice, visual style, values, words to use and avoid, customer promise, and examples of good writing.

FOLLOW THE STEPS

- [ ] **Step 1 — Get interviewed:** Share your website and existing material. Let AI ask questions, then draft your company and brand documents for review.
- [ ] **Step 2 — Share the context:** Provide both documents at the start of every chat, for every new topic. Confirm it can read them.
- [ ] **Step 3 — Ask before advising:** Work through direction, strategy, then an action plan. Explain what doesn't fit instead of restarting.
- [ ] **Step 4 — Save what changed:** Review the closing summary and update your documents with agreed decisions.

COPY: INTERVIEW PROMPT

> Before you advise me, interview me, one question at a time, big picture first.

COPY: SUMMARIZE AND UPDATE PROMPT

> Summarize what we decided, what changed, and what is still uncertain. Suggest updates to my company and brand documents. Keep open questions separate from agreed decisions.

Before saving: Correct assumptions. Keep suggestions separate from facts.