

TRENDS FUTURE NOW

The *Clearwork* AI Playbook

Practical prompts, templates and workflows for using
AI assistants at work.

7 modules · 51 copy-paste prompts · 6 workflows · 7-day plan

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How to use this playbook

This playbook is for people who have tried ChatGPT, Claude, Gemini, Copilot or a similar assistant, got a few generic answers, and suspect they're missing something. You probably are — and the gap is smaller than it looks. Almost all of the difference between a useless answer and a useful one comes from how the request is set up.

The playbook is built to be used, not just read. Module 1 gives you one simple framework. Modules 2 to 7 apply it to the jobs that fill a normal working week: email, meetings, documents, spreadsheets, research and your own career. Module 8 strings the pieces together into repeatable workflows, and the appendices give you a seven-day plan and a checklist for checking AI output before it goes anywhere.

Every prompt is written as a fill-in template. Text in [square brackets] is yours to replace. The prompts work with any mainstream AI assistant, including free versions. Where a feature such as file upload is needed, the prompt says so.

One rule before you start: you are responsible for anything you send, publish or decide. AI assistants are fast, tireless and frequently wrong in confident-sounding ways. Treat every output as a draft from a capable but new colleague — useful, and always worth a check.

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Foundations: how to ask so you get useful answers

Before the prompts, a short tour of what these tools are, where they go wrong, and the one framework the rest of the playbook builds on.

What an AI assistant actually does

A chat assistant predicts a helpful-sounding continuation of your conversation, based on patterns learned from huge amounts of text. That makes it excellent at language tasks — drafting, rewriting, summarising, explaining, brainstorming, reformatting — and unreliable at anything that depends on facts it can't see: today's prices, your company's numbers, what was said in a meeting it wasn't given, or obscure details it has to recall from memory.

The practical takeaway: give it the material, and ask it to work on the material. "Summarise these notes" is far more reliable than "what happened at the Q3 planning meeting?".

The SCOPE framework

Most weak prompts are missing context. SCOPE is a checklist of five things to include. You won't need all five every time, but running through them takes ten seconds and changes the result dramatically.

S — Situation. Who you are, who the audience is, what's going on. "I manage a team of six support agents; this goes to my director, who wasn't in the meeting."

C — Content. The material to work from: pasted notes, an email thread, data, a draft. Paste it in clearly, ideally between markers such as triple quotes.

O — Objective. What the output is for. "So she can approve the budget by Friday" tells the assistant what to emphasise.

P — Parameters. Length, format, tone, what to include or avoid. "Under 150 words, three bullets, no jargon, don't mention the vendor by name."

E — Example. If you have a past version you liked, paste it and say "match this style". Examples beat descriptions.

Iterate instead of starting over

The first answer is a draft. The fastest route to a great result is usually two or three short follow-ups: "shorter", "more direct in the opening", "turn the second paragraph into bullets", "what would

my director push back on?". Each follow-up keeps everything the assistant already knows from the conversation.

If a conversation goes badly off track, start a new one rather than arguing with it. Paste in the best version so far and restate the goal.

Privacy and company rules

Check your employer's policy before using AI tools with work material. Many companies allow approved tools only, or forbid pasting customer data, personal information, unreleased financials, source code or anything under a confidentiality agreement.

A safe habit: remove names, account numbers and identifying details before pasting, replacing them with placeholders such as [Client A]. You can put the real names back in afterwards.

Where it goes wrong — and how to catch it

Invented facts. Assistants sometimes produce plausible statistics, quotes, citations and URLs that don't exist. Never forward a fact you haven't verified at the source.

Overconfidence. Ask "How confident are you in each of these points, and what would you check?" — it often flags its own weak spots.

Missing context. If the answer is generic, the question probably was. Add Situation and Objective.

Bland style. Default output tends to be wordy and upbeat. Ask for plain, direct language and give it an example of your own writing.

Prompts for this module

01 The SCOPE starter

```
Situation: [who I am, who this is for, what's happening].
Content: ""[paste material]""
Objective: [what this output needs to achieve].
Parameters: [length, format, tone, anything to avoid].
Example: ""[optional – a past version I liked]""
Please ask me up to three questions first if anything important is unclear.
```

Tip: Save this as a text snippet so you can paste it in seconds.

02 Make it ask you questions

I need help with [task]. Before you start, ask me the five questions whose answers would most improve the result. Ask them one at a time.

Tip: Useful when you're not sure what context matters.

03 Teach it your style

Here are three examples of messages I've written: ""[paste examples]"" Describe my writing style in five bullet points (tone, sentence length, formality, habits). I'll use your description in future requests.

Tip: Keep the five bullets and paste them into future prompts as Parameters.

04 Self-check

Review your last answer. List any statements that could be factually wrong or that I should verify, and anything important you might have left out.

Tip: Use this before anything leaves your hands.

Email and messages

Email is where most people get the quickest win. These prompts cover the messages that are slow to write because they're delicate, not because they're long.

The 3-sentence rule

Most work emails need three things: why you're writing, what you need, and by when. Ask the assistant to fit a draft into that shape and then add detail only if it's essential. Shorter emails get faster replies.

Tone is a parameter

Name the tone you want and the relationship: "warm but firm, to a supplier we've worked with for years", or "neutral and factual, this may be forwarded to legal". Without it, assistants default to over-friendly.

Prompts for this module

05 Draft from bullet points

Turn these notes into a clear email to [recipient and relationship]. Notes: ""[bullets]"" Keep it under [100] words, lead with the request, and end with a specific deadline: [date].

06 Reply to a long thread

Here's an email thread: ""[paste thread]"" Summarise in three bullets what's being asked of me, then draft a reply that [agrees / declines / asks for more time]. Keep it brief.

07 Say no politely

Draft a polite email declining [request] from [person/role]. Reason: [honest reason]. Offer this alternative: [alternative, or 'none']. Warm, short, no over-apologising.

08 Deliver bad news

I need to tell [audience] that [bad news]. What caused it: [cause]. What we're doing about it: [fix + timeline]. Draft an email that is honest, takes responsibility where appropriate, and focuses on next steps. Under 150 words.

09 Follow up without nagging

Draft a friendly follow-up to [person] about [topic]. I first asked on [date] and haven't heard back. Make it easy to respond – include a yes/no question or a specific next step.

10 Ask for something

Draft a message asking [person/role] for [request]. Why it matters to them: [benefit to them]. What I need exactly: [specifics]. By when: [date]. Confident, not pushy.

11 Rewrite for tone

Rewrite this message to sound [calmer / more confident / more friendly / more formal] without changing the meaning: ""[paste draft]"" Then tell me the main changes you made.

12 Cut it down

Shorten this to half its length while keeping every request and date: ""[paste]""

Tip: Great for messages you wrote while annoyed.

13 Customer complaint reply

A customer wrote: ""[complaint, with names removed]"" Our position: [what we can/can't do]. Draft a reply that acknowledges their frustration specifically, explains clearly, and offers [resolution]. Avoid corporate clichés.

14 Chat message to a busy manager

Turn this into a short chat message for my manager, who reads on mobile: ""
[details]"" Max 3 lines. Lead with what I need from her.

Meetings, notes and planning

Meetings generate most of the follow-up work in an office. AI is very good at turning messy notes into decisions, owners and next steps — as long as you give it the notes.

Notes in, actions out

Type rough notes during the meeting, or use your meeting tool's transcript if your company allows it. Afterwards, paste them in and ask for decisions, action items with owners and dates, and open questions. Check the owners and dates carefully — this is where errors creep in.

Plan the meeting before it happens

A clear agenda with a stated goal shortens meetings. Ask the assistant to draft one from a sentence or two, then cut it to what genuinely needs a live conversation.

Prompts for this module

15 Agenda from a goal

Draft a [30]-minute meeting agenda. Goal: [what we must decide or produce]. Attendees: [roles]. Include time per item and what each person should prepare.

16 Notes to summary

Here are rough meeting notes: ""[paste]"" Produce: 1) a three-sentence summary, 2) decisions made, 3) action items as a table with owner and due date, 4) open questions. Mark anything unclear with [?] rather than guessing.

Tip: The [?] instruction reduces invented details.

17 Follow-up email

Using the summary above, draft a follow-up email to attendees. Short, action items first.

18 Should this be a meeting?

I'm planning a meeting about [topic] with [people]. Goal: [goal]. Could this be handled by email or a shared document instead? If yes, draft that message.

19 Weekly plan

Here's my to-do list and calendar for the week: ""[paste]"" Help me plan: what are the three most important outcomes, what should I move or drop, and where should my focus blocks go?

20 Prepare for a difficult conversation

I have a conversation coming up with [role] about [topic]. My goal: [goal]. Their likely concerns: [concerns]. Help me prepare: key points, likely objections with calm responses, and a good opening line.

21 Brainstorm partner

I need ideas for [problem]. Constraints: [budget, time, rules]. Give me 15 varied ideas, from safe to bold. Then pick the three most promising and explain why.

Reports, documents and presentations

Writing longer documents is where AI saves the most time — and where it needs the most supervision. Use it to structure, draft and tighten; keep the facts and judgement your own.

Outline first, then draft

Ask for an outline, edit it until the structure is right, then ask for one section at a time. You stay in control of the argument and get far better drafts than “write me a report on X”.

Your data, your numbers

Paste in the real figures and ask the assistant to describe them. Never let it supply numbers on its own. If it writes a statistic you didn't give it, delete it or verify it.

Prompts for this module

22 Outline a document

I need to write a [report / proposal / plan] for [audience]. Purpose: [purpose].
Key material: ""[notes or data]"" Propose an outline with section headings and one line on what each section should cover.

23 Draft one section

Using this outline ""[outline]"" and these notes ""[notes]"", draft the section '[section name]'. About [200] words. Plain, direct language. Don't add facts that aren't in my notes.

24 Weekly status report

Turn these updates into a status report for [audience]: ""[bullet updates]""
Format: Highlights, Progress against goals, Risks and blockers, Next week. Keep each section to 2–4 bullets.

25 Executive summary

Write a five-sentence executive summary of this document for a senior reader who will only read this part: ""[paste]"" Lead with the conclusion and the decision needed.

26 Edit for clarity

Edit this for clarity and brevity. Keep my voice and all facts. Show the edited version, then list the three biggest changes: ""[paste]""

27 Find the holes

Read this proposal as a sceptical [finance director / client / engineer]. What questions would you ask? What's weak or missing? ""[paste]""

Tip: One of the most valuable prompts in this playbook.

28 Slides from a document

Turn this document into a [8]-slide outline for a presentation to [audience]. For each slide: a headline that states the point, 3 supporting bullets, and a suggested visual. ""[paste]""

29 Speaker notes

Write natural speaker notes for this slide, about 45 seconds when spoken: ""[slide content]""

30 Plain-English version

Rewrite this for a reader with no background in [topic]. Replace jargon, keep it accurate, and add one everyday example: ""[paste]""

Spreadsheets and data

You don't need to be a spreadsheet expert to get spreadsheet-expert help. These prompts cover formulas, cleaning up messy data and making sense of numbers.

Describe the sheet, not just the problem

Formulas depend on your layout. Tell the assistant which columns hold what, which row the data starts on, and which program you use (Excel, Google Sheets, Numbers). Paste a few example rows with sensitive data replaced.

Check the formula on a small sample

Before filling a formula down 5,000 rows, test it on five rows where you know the right answer. If your assistant can run code or analyse uploaded files, you can also ask it to show its working.

Prompts for this module

31 Write a formula

I'm using [Excel / Google Sheets]. Column A has [], column B has [], data starts on row 2. I want column C to show [result]. Give me the formula for C2 and explain how it works in plain English.

32 Fix a broken formula

This formula returns [error / wrong result]: [formula]. The columns contain [description]. What's wrong and what's the corrected version?

33 Clean messy data

Here are sample rows from a messy column: ""[paste 10 examples]"" I need them standardised as [desired format]. Give me a formula or step-by-step method in [program].

34 Summarise a table

Here is a table: ""[paste CSV or table]"" Describe the three most important patterns or changes, and anything that looks unusual. Use only the numbers provided.

35 Choose a chart

I want to show [audience] [what the data should communicate]. Data: [describe columns]. What chart type fits best, and how should I label it?

36 Build a simple tracker

Design a spreadsheet to track [what]. List the columns I need, an example row, any helpful formulas, and conditional formatting rules.

37 Explain a spreadsheet you inherited

Here are the formulas from a sheet I inherited: ""[paste]"" Explain what this sheet does, step by step, and point out anything fragile.

Research, learning and decisions

AI is an excellent study partner and thinking partner. It is a poor encyclopaedia. These prompts lean on what it's good at — explaining, comparing, questioning — and build verification in.

Summaries of what you give it

Paste an article, report or document (or upload it, if your tool supports files) and ask for a summary. This is reliable because the assistant is working from the text in front of it. Asking it to recall a report from memory is not.

Use tools with search for current facts

Some assistants can search the web and cite sources. For anything that changes — prices, regulations, people in roles — use that mode, then click through and check the sources yourself.

Prompts for this module

38 Summarise a document

Summarise this for me in [5] bullets, then list any claims that would need checking before I relied on them: ""[paste]""

39 Explain like a mentor

Explain [concept] to me as if I'm a smart beginner. Start with a one-sentence definition, then an everyday analogy, then the three things people most often get wrong.

40 Quiz me

I'm learning [topic]. Ask me five questions, one at a time, starting easy and getting harder. Tell me what I got wrong and why.

41 Compare options

Help me compare [option A], [option B] and [option C] for [purpose]. My priorities, in order: [priorities]. Make a comparison table, then tell me what extra information would change the answer.

42 Pros, cons and blind spots

I'm considering [decision]. List the strongest arguments for and against, then the questions I haven't asked myself yet.

43 Pre-mortem

Imagine it's six months from now and [project] has failed. Write the five most likely reasons it failed, and what I could do now to prevent each.

44 30-day learning plan

Make me a 30-day plan to learn [skill] in about [20] minutes a day. Goal: [concrete project]. Include free resources to look for and a small practice task for each week.

Your career: CV, applications and interviews

AI can help you present your real experience clearly and prepare thoroughly. It should never invent experience, qualifications or results — employers check, and it's dishonest.

Tailor, don't fabricate

The best use of AI in a job search is matching your genuine experience to the language of a specific role. Give it your real CV and the job description, and ask where they line up and where the gaps are.

Quantify what's true

Achievement bullets are stronger with numbers, but only real ones. Ask the assistant to help you find measurable outcomes in your work, then fill them in from your own records.

Prompts for this module

45 Match CV to a role

Here's a job description: ""[paste]"" and my CV: ""[paste]"" Which of my experiences match the role best? Which requirements am I weakest on? Suggest how to reorder and reword my CV to highlight the genuine matches. Don't add anything I haven't done.

46 Stronger achievement bullets

Rewrite these CV bullets to lead with impact and action verbs. Where a number would help, insert [X] for me to fill in from my records rather than inventing one: ""[bullets]""

47 Cover letter draft

Draft a cover letter for [role] at [company] using my CV and the job description above. Three short paragraphs: why this role, two relevant examples from my experience, and a confident close. Under 250 words.

48 Likely interview questions

Based on this job description, list the ten interview questions I'm most likely to be asked, including two difficult ones.

49 Practise an answer

Here's my draft answer to '[question]': ""[answer]"" Give feedback using the STAR structure (Situation, Task, Action, Result). What's missing, and how could it be tighter?

50 Mock interview

Run a mock interview for [role]. Ask one question at a time, wait for my answer, then give brief feedback before the next question. Six questions in total.

51 Ask for a raise — preparation

Help me prepare for a conversation with my manager about [pay / promotion]. My contributions this year: [list]. What I'm asking for: [ask]. Draft talking points and responses to likely objections. Calm, factual tone.

Workflows: putting it together

Individual prompts save minutes. Repeatable workflows save hours. Pick two of these, run them for a fortnight, and adjust them to fit your job.

Monday 20-minute plan

Start the week with priorities instead of reacting to the inbox.

1. Paste your calendar and to-do list into the Weekly plan prompt (Module 3).
2. Ask: "Which three outcomes would make this week a success?" Agree or edit.
3. Book two focus blocks in your calendar for the top outcome.
4. Ask for a two-line message to your team or manager sharing your priorities, if useful.

Inbox triage in 15 minutes

Clear the backlog without writing every reply from scratch.

1. Skim and sort: needs a reply today, can wait, no reply needed.
2. For each long thread, use "Reply to a long thread" (Module 2) to get the ask and a draft.
3. Use "Cut it down" on anything over 150 words.
4. Send, then archive. Don't let the assistant send anything for you.

Meeting to action items

Never lose a decision in a notebook again.

1. During the meeting, type rough notes — words, not sentences.
2. Run "Notes to summary" (Module 3). Check owners and dates.
3. Run "Follow-up email". Send within the hour while it's fresh.
4. Add your own action items to your to-do list.

Friday status report

A good update in ten minutes instead of an hour.

1. Keep a running list of one-line updates during the week (a note on your phone works).
2. Paste them into "Weekly status report" (Module 4).
3. Run "Find the holes" as your manager: what would they ask?
4. Answer those questions in the report before you send it.

Writing a proposal

From blank page to solid draft in an afternoon.

1. Run "Outline a document" with your notes. Edit the outline yourself.
2. Draft section by section with "Draft one section".
3. Run "Find the holes" from two different perspectives.
4. Finish with "Executive summary" and a final read-through out loud.

Learning sprint

Pick up a new work skill in a month.

1. Use "30-day learning plan" (Module 6) with a concrete project as the goal.
2. Each session: learn for 10 minutes, practise for 10.
3. Twice a week, use "Quiz me" on what you've covered.
4. At the end, use "Explain like a mentor" on anything still fuzzy.

APPENDIX A

Your first seven days

About 20 minutes a day. By the end of the week you'll have a handful of prompts you use without thinking.

Day 1	Read Module 1. Save the SCOPE starter as a snippet. Run "Teach it your style" with three of your own messages.
Day 2	Use three email prompts from Module 2 on real messages. Compare the results with what you'd have written.
Day 3	Run "Notes to summary" after your next meeting and send the follow-up.
Day 4	Draft a document section with the outline-then-draft method from Module 4.
Day 5	Pick one spreadsheet task you avoid and use a Module 5 prompt on it.
Day 6	Use "Pre-mortem" or "Find the holes" on something you're working on.
Day 7	Choose two workflows from Module 8 to make habits next week. Note which prompts you used most and keep them handy.

APPENDIX B

Before-you-send checklist

Run through this before any AI-assisted work leaves your hands.

- ☐ Did I give it the material, rather than asking it to remember facts?
- ☐ Have I verified every number, name, date, quote and link at the original source?
- ☐ Does the output say anything I wouldn't be comfortable defending as my own?
- ☐ Have I removed confidential or personal data, and does my company allow this tool?
- ☐ Is the tone right for the reader and the relationship?
- ☐ Is it as short as it can be?
- ☐ If it's going to a customer or the public, has a human read the final version?

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