

THE AI CHEAT SHEET

Everything your team needs on one page. Keep it at the desk.

1 KEEP IT SAFE: THE AI TRAFFIC LIGHT

Before anything gets typed or pasted, ask: what color is this?

GREEN

Marketing copy, published photos, general questions

Any tool

YELLOW

Internal drafts, schedules, SOPs, vendor lists

Company account only

RED

Pricing, financials, client and employee records, NDA terms

Never in a free tool

When in doubt, move up a color.

Company work happens in a company account, and a human reviews it before it goes out.

2 THE PROMPTING RECIPE

Ten extra seconds on the ask saves ten minutes fixing the answer.

ROLE

Who it acts as

"Act as an office manager for a dental practice..."

TASK

What you need

"...draft a follow-up email to a customer..."

CONTEXT

Audience, limits

"...plain English, under 150 words..."

FORMAT

How you want it

"...as an email I can paste and send..."

GUARDRAIL

What it must not do

"...use only the notes below. Add nothing else."

The guardrail is the piece almost everyone skips.

If the answer misses, do not start over. Reply with what to fix: "Shorter. Warmer. Drop the second paragraph."

3 THREE TO TRY THIS WEEK

Swap in your own documents. The recipe carries.

Read a contract

"Here is an agreement. Pull the key business terms into a table: scope, amount, payment terms, obligations, and termination. Then list the clauses I should look at closely, rated HIGH, MEDIUM, or LOW concern, sorted highest first. Use only the document below."

Notes to document

"Using only the notes below, draft a professional summary of what changed, why, and the cost and schedule impact. Factual, no blame. Format it so it can be approved quickly. Add nothing I have not listed."

Customer follow-up

"Write a follow-up email covering the work we completed today and what we recommend addressing soon. Plain English, friendly, no scare tactics, under 150 words. Use only the notes below."

4 MAKE IT STICK

One task, one win, then stack the next one.

Two habits to build

Summarize one long document a day. Draft first, then edit. Your judgment is what makes it good.

One rule to keep

Know what color your information is, use a company account, and verify every fact before it goes out.

One thing to write down

A one-page AI policy: your approved tool, the color rule, and who to ask. Teach it before the first prompt.