

For your team

VIDEO 7 · AI SKILLS SERIES

How to Build Your Own AI *Assistant*

Many People use AI reactively — something comes up, they open a chat, they ask. But there's a better way: a customized assistant that already knows who you are, what you do, and how you like to work. Every conversation builds on context — it doesn't start from zero.

FORMAT*Team discussion***WATCH**

Video 7

SERIES

AI Script Discussion Guides

BEFORE YOU START

Meeting overview

OVERVIEW

Many People use AI reactively — something comes up, they open a chat, they ask. But there's a better way: a customized assistant that already knows who you are, what you do, and how you like to work. Every conversation builds on context — it doesn't start from zero.

GOAL OF THIS MEETING

Understand how to set up a custom AI assistant and add the context, preferences, and documents that would make it genuinely - and repetitively - useful for your role.

Agenda

3 PARTS

01 Icebreaker

02 Discussion questions

03 AI skill tip

OPEN THE DISCUSSION

Warm *up.*

01 Icebreaker

Invite everyone in the group to share. Keep answers to one or two minutes per person.

What's something you find yourself re-explaining over and over — to a new colleague, a vendor, or to AI — that you wish you only had to say once?

GO DEEPER

The *discussion.*

02 Questions for discussion

Move through the questions at the pace that suits your group. You don't need to cover every one — pick the prompts that resonate and let the conversation breathe.

- 01 Has anyone built a custom GPT, a Claude Project, Claude Skill, or any kind of saved AI setup? How did it help your workflows? Walk us through what context you added to it.
- 02 Using the AI Custom Assistant Starter as a template, type out your prompt for setting up a custom AI assistant and save it to test later. What did you tell the AI you always want, or never want? Share your answers with the group.
- 03 What documents would you add to your assistant as context, to make it more useful?
- 04 The video suggests four specific operational uses for your AI assistant: prioritizing your to-do list, gut-checking your calendar against your priorities, starting the week by asking what you might be underestimating, and ending the week by thinking through what needs a plan. Which of those four sounds most immediately useful to you?
- 05 What's one time-consuming thing you do regularly that you could do with an AI assistant? How would you go about it? Commit to doing it before the next meeting.

TRY THIS

AI skill *tip.*

03 AI skill tip

AI Skill: Custom Assistant Starter Set one up in under 10 minutes: Claude: Projects → New Project → Add instructions. ChatGPT: Explore GPTs → Create a GPT. Start with this: 'I am a [role] at a [type of org]. My main responsibilities are [X, Y, Z]. I write for [audience]. My communication style is [brief/direct/collaborative]. I always want [e.g., recommendation before rationale]. I never want [e.g., jargon / long intros].' Add one document and test it on a real task this week.