



ASCENDEA

AI / BUSINESS GROWTH / PROMPT PACK

AI Agency Builder — Responsible Prompt Pack

A UK-focused pack of 39 human-reviewed prompts for testing a focused AI services offer, planning responsible outreach, scoping a bounded pilot and reviewing delivery evidence. Includes privacy, PECR, human-review, restricted-permission and fallback safeguards.



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ascendea.ai

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<https://ascendea.ai/>

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A practical prompt pack for UK SME founders and responsible AI service providers

Author: Rob Arnold · Ascendea · <https://ascendea.ai/>

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What this pack is for

This is a working pack of 39 prompts for defining, testing, selling and delivering a **bounded AI-enabled service**. It follows a practical sequence: choose a focused service model; test a buyer problem; define a clear offer; price from visible assumptions; conduct lawful, relevant outreach; run discovery; deliver a controlled pilot; and review what actually happened.

The prompts create **drafts for human judgement**, not decisions, legal advice, financial forecasts, or permission to contact people, deploy a system, or make promises. AI can produce plausible but incorrect content. Check every factual statement, price, calculation, legal/compliance point, client-specific assertion and external message before use. Do not publish or send generated material without a responsible human review.

Examples, calculations, price ranges, timeboxes and activity targets in this pack are **illustrative planning inputs only**. They are not Ascendea prices, market benchmarks, income claims, conversion claims or delivery promises. The fictional examples are clearly labelled and are not testimonials or client results.

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How to use the prompts safely

1. Start with the foundation prompts and retain a short decision log. Mark each input as **known**, **assumed**, or **to verify**.
2. Copy the **Pack Guardrails** below and place them before the prompt you choose. Replace bracketed text only with information you are permitted to use.
3. Give the model enough bounded context to draft well. Do not use it as a source of unverified facts, market research, prices or legal interpretation.
4. Review the output against the check below. Edit it in your own voice and obtain any necessary client, legal, privacy or security approval.
5. Treat a generated communication as a draft. Send it manually only after checking identity, recipient status, lawful basis, privacy information, objections and channel rules.

Pack Guardrails — paste before every prompt

Work only from the information I provide and clearly mark anything that is assumed, estimated or missing. Do not invent company names, client results, quotes, citations, qualifications, prices, legal conclusions, technical capabilities or current events. If a fact needs external verification, list it as “Verify before use”.

Do not ask for or reproduce passwords, API keys, access tokens, payment-card details, authentication codes, confidential documents, special-category personal data, full contact lists, unredacted client records or proprietary source material. Use placeholders or a minimised, anonymised summary instead. Do not advise bypassing permissions, platform rules, consent, privacy law or a client’s policies.

Create a reviewable draft only. Do not send messages, contact people, change systems, make commitments, approve a release or take any consequential action. Keep AI outputs internal unless a named human reviewer approves them.

For AI workflows, state the permitted task, restricted permissions, human-review point, escalation route and manual fallback. For outreach, distinguish corporate subscribers from sole traders and relevant partnerships; stop on an objection or opt-out; and flag the need to check PECR, UK GDPR, privacy information and the current ICO guidance.

Human review before any external use

- ☐ I used only information I am permitted to share and removed secrets, confidential material and unnecessary personal data.
- ☐ I can support every factual claim, price, performance statement, quote and case-study detail with evidence or have removed it.

- ☐ I have labelled assumptions, illustrative maths and fictional examples accurately.
- ☐ A named person has checked scope, commercial terms, client approvals and the intended audience.
- ☐ If personal data or marketing is involved, I have checked the applicable lawful basis, privacy information, PECR channel/subscriber rules, objections and suppression records.
- ☐ If the output concerns an AI workflow, I have confirmed least-privilege access, a human-review step, testing, an escalation path and a manual fallback.
- ☐ The output does not promise a client outcome, a fixed launch result, meetings, sales, savings or compliance certification.

1. Foundations and service model

1. Compare four starting service models

Use with: your skills, relevant experience, available weekly capacity, budget range, buyer access and known delivery gaps. Do not provide CVs containing unnecessary personal data.

Apply the Pack Guardrails.

Act as a responsible AI-services business adviser. Compare four possible starting models for my next 90-day learning period: workflow automation; AI-assisted marketing services; internal AI applications or assistants; and AI assessment/advisory.

Return a table with one row per model and these columns: relevant experience evidence; delivery readiness (1–5); buyer access (1–5); implementation/security burden (1–5, where 5 is lower burden); key risk or gap; and what must be tested before selling. Give a one-sentence reason for each score that refers only to my input.

Recommend one narrow starting model and one buyer/process hypothesis to test. Explain why it is more responsible than the runner-up at my present capability. Name work I should not sell yet and a review date. Scores are planning judgements, not predictions of revenue or success.

My permitted, high-level context: [skills and work history; buyer/industry familiarity; weekly capacity; budget range; tools already available; concerns and gaps].

2. Define a minimum viable capability stack

Use with: the selected model, task, client environment constraints, budget range and existing tools. Do not paste account details, API keys, contracts or client data.

Apply the Pack Guardrails.

Act as an operations adviser for a small, responsible AI-services practice. Design a minimum capability stack for my chosen service. Do not select a vendor merely because it is popular, and do not state current prices as fact unless I supply them.

Provide: (1) the capability needed for AI/model access, integration or automation, CRM/pipeline, secure documentation, project tracking and invoicing; (2) a minimum requirement for each capability; (3) an “existing tool can cover this” check; (4) estimated cost fields marked “verify with provider”; and (5) an upgrade rule tied to a real requirement such as approved security controls, volume, support need or client integration.

Include a security section: credentials stay in a password manager or approved secret store, client environments/accounts are separated where appropriate, permissions are limited, and ownership is recorded. State that a consumer subscription and API use may be different products. If OpenAI development is relevant, flag that the Assistants API was sunset on 26 August 2026 and that new integrations should be checked against the current Responses API documentation.

My permitted context: [service model; narrow task; current tools; monthly budget range; client/security constraints; provider preferences or exclusions].

3. Audit current tools and subscriptions

Use with: tool names, broad purpose, billing cycle and cost range. Exclude logins, licence keys, payment details and client-specific workspace names.

Apply the Pack Guardrails.

Act as a cost-and-risk reviewer. Audit my current tools against the capabilities required for my selected service, not against a generic “six-tool” formula.

Return three sections: Keep; Review/Consolidate; and Cancel at renewal. For each entry, state the service capability it supports, duplication or risk, and the evidence needed before any cancellation. Calculate a total only from figures I supply and label it an illustrative budget effect. Do not recommend cancelling a tool that holds records, invoices, client data or security controls without a documented export, retention, access and migration check.

Finish with one simple rule for adding a new tool: a named requirement, accountable owner, total cost, data/permission check and a review date.

My permitted context: [chosen model and task; tools, purpose, billing cycle and estimated cost; retention or migration constraints].

4. Draft a truthful LinkedIn profile summary

Use with: service model, specific buyer, process, truthful background and a carefully bounded offer. Do not imply a track record you cannot evidence.

Apply the Pack Guardrails.

Act as a B2B profile editor. Draft three LinkedIn headline options (220 characters or fewer each) and a 90–130 word first-person About section. State plainly the buyer, process problem, capability and safeguard or boundary. Avoid vague labels such as “innovative”, “cutting-edge” or “AI expert”.

Do not claim results, clients, qualifications or availability that I have not supplied. If I am validating a new service, use accurate wording such as “developing”, “testing” or “offering a focused pilot”, where true. End with a low-pressure call to action that does not promise a meeting or outcome.

My permitted context: [chosen service model; target buyer; process/outcome hypothesis; relevant verifiable background; boundaries; desired call to action].

2. Positioning and buyer–problem validation

5. Draft positioning–sentence candidates

Use with: industries you know, a real process, a buyer role, evidence from conversations and a bounded capability. Do not present projections as achieved results.

Apply the Pack Guardrails.

Act as a B2B positioning strategist. Generate eight positioning-sentence candidates using this structure: “I help [specific buyer] improve [specific process or decision] using [bounded capability], with [human safeguard or operating boundary].”

Use a real job role and organisation type, not “businesses” or “founders”. Make the improvement observable, but do not invent percentages, cash savings, appointments or revenue. Vary buyer/process combinations only within my evidence. For each candidate, label the outcome measure as known, assumed or to verify. Then identify the three clearest candidates and name the question I should ask real buyers to test each one.

My permitted context: [service model; industries/roles I understand; process problems observed; evidence; capability; safeguards; exclusions].

6. Pressure–test a positioning sentence

Use with: one exact sentence and the evidence behind it. This is a hypothesis test, not market proof.

Apply the Pack Guardrails.

Act as a positioning critic. Test my sentence against four checks: Buyer clarity (can I identify a real role and organisation type?); Process clarity (can the process be observed?); Evidence quality (what supports its importance?); and Delivery boundary (can I say what the system will and will not do?).

For each check, rate it Strong, Needs evidence or Rewrite; give a brief reason from my input; and suggest one precise edit. Finish with “keep”, “sharpen” or “rewrite”, plus the single highest-value validation conversation to run next. Do not invent named companies, finance measures or buyer demand.

My positioning sentence: [exact sentence].

My permitted evidence and assumptions: [notes].

7. Build a responsible target-account research brief

Use with: a positioning sentence, geography, permitted company-size/sector boundaries and public research criteria. Do not upload scraped contact lists or personal profiles.

Apply the Pack Guardrails.

Act as a market-research planner. Create a target-account research brief for my positioning sentence. If I have not supplied verified public sources, do not invent real company names; give clearly defined organisation profiles and a research method instead.

Return a 15-row table of either user-supplied, verified companies or target profiles. Include: fit reason; likely process owner role; public evidence to look for; reachability hypothesis; and “verify before contact” checks. Add a practical method for finding further organisations through public, permitted sources without scraping restricted data or collecting unnecessary personal data.

End with a judgement on whether the buyer definition is likely too broad, too narrow or ready for a small validation sample, and explain what evidence would change that judgement.

My permitted context: [positioning sentence; country/region; sectors; company size; any verified public company list and sources].

8. Draft a compliant positioning-test message

Use with: a positioning sentence, recipient category, channel, a genuine observation and compliance status. Never use this prompt without checking recipient type and channel rules.

Apply the Pack Guardrails.

Act as a UK B2B outreach editor. Draft a low-pressure positioning-test message of no more than 70 words for [LinkedIn direct message/email]. It must reference only a genuine observation I provide, state my service hypothesis honestly, and ask one simple research question. It must not imply a prior relationship, a client result or consent.

Before drafting, show a “send only if” checklist: recipient is a corporate subscriber or the applicable PECR route for an individual subscriber has been checked; personal-data lawful basis and privacy information are in place where required; identity and valid opt-out/contact route are included where applicable; and the person has not objected or opted out. If any input is unknown, do not draft a send-ready message; instead provide a research-only version marked “do not send until checked”.

Provide a short LinkedIn version and a shorter email version. State that social direct messages can be electronic mail for PECR purposes and must be assessed accordingly.

My permitted context: [positioning sentence; channel; verified public observation; recipient subscriber type/status; lawful-basis/privacy/opt-out checks; my truthful business identity].

9. Interpret validation replies without overstating demand

Use with: verbatim but minimised reply excerpts, your original message and the test question. Redact names, email addresses and confidential details.

Apply the Pack Guardrails.

Act as a qualitative research analyst. Classify each reply as: concrete interest; useful objection; polite acknowledgement; not relevant; or insufficient information. Quote only the short phrase I supplied that supports the classification. Do not infer buying intent, budget or permission from politeness.

Summarise recurring problem language, objections, decision roles and unanswered questions. Then recommend one of: refine the hypothesis; run more problem interviews; prepare a bounded assessment offer; or stop and choose another problem. Explain the evidence threshold you would need for the next step. Do not use a fixed “two out of three” rule as proof of demand.

My positioning sentence and original question: [text].
Redacted replies: [reply 1, reply 2, reply 3...].

3. Offer design and scope

10. Create an Assess–Pilot–Support offer stack

Use with: validated problem evidence, your actual capability, delivery constraints and cost assumptions. All fees/times must be marked illustrative until agreed.

Apply the Pack Guardrails.

Act as a responsible productised-services designer. Draft three standalone, bounded offers: Assess, Pilot and Support. Each must make sense on its own; a buyer must not need to buy the next stage to receive what was promised.

For each offer provide: intended buyer and problem; scope and deliverables; supported inputs/systems; explicit exclusions; client responsibilities; human review and manual fallback; evidence/acceptance approach; price basis; third-party cost treatment; timeline assumptions and pause conditions; and support/ownership boundary. Label all prices and timelines “illustrative until confirmed”. Include the option that a non-AI process change may be the better recommendation.

Do not claim full automation, compliance certification, a guaranteed result or a fixed delivery duration. Flag any part needing a specialist, contract or security review.

My permitted context: [positioning sentence; evidence; task; delivery skills; estimated effort/cost; required tools; client dependencies; risks].

11. Draft a one-page offer menu

Use with: reviewed offer details only. This is marketing copy, not a statement of work or contract.

Apply the Pack Guardrails.

Act as a plain-English service-menu editor. Write copy for one page that names the intended buyer, then presents my Assess, Pilot and Support offers. For each include title, price basis or confirmed range, timing assumption, one-line purpose, three deliverables, and a concise boundary.

Use factual, non-hyped language. Preserve “illustrative” labels for unconfirmed prices and timelines, say when third-party costs or VAT treatment need confirmation, and avoid performance or savings claims without evidence. Finish with a next step that offers a fit conversation or assessment without promising an outcome. Keep the draft under 400 words.

My reviewed offer details: [titles; buyer; scope; deliverables; exclusions; prices/ranges; timing assumptions; third-party costs; next step].

12. Write a concise “what do you do?” answer

Use with: a truthful positioning sentence and reviewed offer descriptions. Do not recite prices that are not ready to quote.

Apply the Pack Guardrails.

Act as a sales-communication coach. Draft two spoken answers to “What do you do?”: a 30-second discovery-call version and a shorter networking version. Each should name my buyer, the process problem, the bounded capability, the safeguard, and the practical first step.

Mention prices only where I have supplied a confirmed price basis. Otherwise say that scope and third-party costs are confirmed after discovery. Do not claim guaranteed savings, autonomous operation, a client roster or specialist status I have not supplied. End with a calm invitation to explore fit.

My permitted context: [positioning sentence; offers and their confirmed/illustrative price status; safeguard; next step].

13. Find scope-creep gaps before a proposal goes out

Use with: the exact draft offer or proposal. Remove client names, credentials and sensitive data.

Apply the Pack Guardrails.

Act as a delivery risk reviewer. Review my offer for places where a reasonable client could misunderstand scope, ownership, data access, testing, support, change control or “done”. Return: (1) a gap list ranked by consequence; (2) a precise boundary or question to add for each gap; (3) dependencies the client must provide; and (4) the one risk that needs a discussion before pricing.

Include AI-specific checks: permitted inputs; prohibited actions; source-data authorisation; least-privilege access; human reviewer; escalation; manual fallback; monitoring; version/change control; and account/asset ownership. Do not create legal terms or represent the result as a legal review.

Draft offer/proposal: [redacted text].

4. Value, pricing and commercial discipline

14. Build a value-and-cost assumption sheet

Use with: client-provided or observed baseline data, source/date, uncertainty and proposed workflow. Do not invent hours, salary costs, volumes or realised benefit.

Apply the Pack Guardrails.

Act as a commercial-planning analyst. Build an assumption sheet for one proposed offer. Separate: baseline task volume/time; source and observation window; assumed staff cost or other input; projected change; human review/fallback effort; recurring tool/usage cost; one-off implementation cost; and the mechanism by which capacity might become a realised benefit.

Show the maths step by step only from my inputs. Label every output “illustrative planning calculation – verify with the client”. Distinguish capacity value from cash saving, revenue and profit. Provide a reduced-benefit and higher-cost scenario, then list the three assumptions that must be tested in a pilot before any outcome statement is used.

My permitted context: [offer; baseline data with source/date; cost inputs; projected workflow; recurring and one-off costs; known uncertainties].

15. Recommend a defensible price range

Use with: delivery cost floor, scope, risk, client context and value assumptions. This does not set a universal percentage-of-value price.

Apply the Pack Guardrails.

Act as a fixed-scope services pricing reviewer. Suggest a defensible price range and price basis for my offer using: delivery hours, contingency, direct costs, required specialist input, support exposure, client risk, and the illustrative value assumptions supplied. Do not use a universal percentage of client value.

Show three scenarios—lean scope, expected scope and higher-risk scope—with the assumptions behind each. Calculate my internal delivery-cost floor from inputs only and state what it excludes, such as tax and unallocated overhead. Recommend either a fixed price, a range pending discovery, or a paid assessment first. Label every figure illustrative and list what must be confirmed before a quote is issued.

My permitted context: [scope; hours; internal cost rate; contingency; direct costs; specialist costs; support boundary; client value assumptions; risks; VAT status to confirm].

16. Run an illustrative overrun stress test

Use with: a draft price, hours, direct costs and your own minimum sustainable contribution. This is a planning aid, not a margin benchmark.

Apply the Pack Guardrails.

Act as a service-delivery financial reviewer. Stress-test my draft price using a

1.5× hours scenario, plus the direct-cost and contingency assumptions I provide. Show the formula and results clearly. Compare the result only with my stated internal floor; do not impose a universal hourly-rate target or claim profit.

Then give two responsible options if the scenario is weak: narrow the scope, revise the price basis, phase the work, or add a paid assessment. State the trade-off for each option. Label all maths illustrative and identify assumptions that need real delivery evidence.

My permitted context: [offer; draft price; estimated hours; 1.5× hours or alternative scenario; direct costs; contingency; my internal floor; exclusions].

17. Reply to a request for a cheaper or different scope

Use with: the agreed scope, request, known change effort and contractual constraints. Do not punish an ordinary question with an arbitrary price multiplier.

Apply the Pack Guardrails.

Act as a client-communication editor. Draft two short, warm replies to a request for a smaller budget or additional work. Reply A should offer a smaller, clearly bounded assessment or pilot if appropriate. Reply B should explain that the new request is outside the current scope and offer a separately scoped option with price/timing to be confirmed.

Each reply must state what remains included, what changes, and the next decision. Do not apologise for a valid boundary, make a pressure claim or invent a price. Add a short internal note identifying what must be documented through change control before work begins.

My permitted context: [current offer/scope; exact request; available lower-scope option; known constraints; any confirmed prices or timing].

5. Outreach and pipeline — UK-aware drafts

The ICO distinguishes **corporate subscribers** (including companies and LLPs) from **individual subscribers** such as sole traders and certain partnerships. Electronic-marketing rules differ, while UK GDPR still applies where personal data is processed. For corporate electronic mail, do not conceal identity and provide a valid opt-out route; do not treat this as a reason to ignore data-protection duties or objections. The ICO notes that this guidance is under review following the Data (Use and Access) Act, so recheck it before a campaign.¹

18. Draft personal LinkedIn connection requests

Use with: a genuine, public observation for each prospect and their role; no scraped profile data or implied personal familiarity.

Apply the Pack Guardrails.

Act as a UK B2B outreach editor. Before drafting, check that I have supplied: recipient subscriber classification; channel/PECR route; UK GDPR lawful-basis and privacy-information position where personal data is processed; truthful identity and a valid opt-out/contact route; and a suppression/objection check. If any item is unknown or fails, return only the missing checks and do not write a send-ready request.

When those checks are present, create up to 10 LinkedIn connection-request drafts, each no more than 280 characters, from the public observations I supply. Each draft should reference one real observation, state a relevant process theme without pitching a result, and ask only to connect. Require a human to check that the applicable identity and opt-out/contact treatment is present and usable before sending.

Include a “do not use” warning beside any record where the observation is unverified, sensitive, stale, personal or could look intrusive. Do not imply that the person knows me, that I have worked with their organisation, or that a connection acceptance gives marketing consent. Remind me to assess direct messages as electronic mail where applicable and to respect objections.

My permitted context: [buyer role; positioning sentence; one public, verifiable observation per person; subscriber classification; channel/PECR route; UK GDPR lawful-basis/privacy-information position where applicable; identity and opt-out/contact route; suppression/objection check].

19. Draft a post-connection follow-up for review

Use with: recipient subscriber status, channel assessment, approved offer, lawful-basis/privacy information and opt-out process. If unknown, output a compliance checklist rather than a send-ready message.

Apply the Pack Guardrails.

Act as a UK B2B outreach editor. First assess whether I supplied enough information to draft a compliant follow-up. If not, list the missing checks and do not write a send-ready message.

If the checks are present, draft a friendly message of 90 words or fewer. Refer to one relevant business problem, describe the Assess offer as a bounded next step, and invite a short fit conversation without promising a result. Include an honest identity and an appropriate opt-out/contact line where relevant. Do not state or

imply that acceptance of a connection is consent.

My permitted context: [recipient subscriber type; channel; relevant observation; lawful basis; privacy-information route; opt-out/suppression check; business identity; assessed offer and price status].

20. Draft a cold email only after a PECR/UK GDPR gate

Use with: a corporate-subscriber confirmation or documented permitted route, plus a genuine business trigger. Do not supply personal email lists or use automation to send the output.

Apply the Pack Guardrails.

Act as a UK B2B email editor. Start with a gate. Confirm whether the recipient is a corporate subscriber or an individual subscriber such as a sole trader/certain partnership; whether I have assessed the applicable PECR basis; whether processing a named contact's data has a documented UK GDPR lawful basis and privacy-information route; and whether the person/business is absent from the suppression list. If any item is unknown, stop and return only "do not send until checked".

When the gate passes, draft one plain email: subject of six words or fewer; four short sentences; a genuine, supplied business trigger; a relevant process question; a bounded offer; and a low-pressure invitation. Include truthful sender identity and a valid opt-out route. Do not use tracking, attachments, false familiarity, fabricated case studies or a misleading "Re:" subject.

My permitted context: [corporate/individual subscriber status; PECR and UK GDPR checks; public trigger; buyer problem; offer; identity; opt-out route].

21. Draft a limited, human-reviewed follow-up sequence

Use with: an approved initial email, subscriber/compliance status and a real reason to follow up. No automatic deployment or re-contact list is created by this prompt.

Apply the Pack Guardrails.

Act as a UK B2B email editor. Draft up to two short follow-ups to my approved initial email: one after a reasonable interval and one final, low-pressure close-the-loop message. Each must add a relevant point or invite a simple yes/no answer without repeating the first email verbatim.

Before each draft, list the human checks required: no opt-out/objection; correct subscriber classification; no changed circumstances; no excessive frequency; and an appropriate privacy/identity/opt-out treatment. State that I must stop immediately on an objection or opt-out and record the suppression action. Do not claim follow-ups increase replies or prescribe a universal cadence. Do not create an automated 90-day re-contact sequence.

My approved first email and permitted context: [email; reason for follow-up; channel/subscriber compliance checks; opt-out status].

22. Ask a warm contact for an introduction truthfully

Use with: a genuine relationship and a precise buyer/process hypothesis. Do not pass the contact's details into a campaign without thought or permission.

Apply the Pack Guardrails.

Act as a referral-request editor. Draft one message of 90 words or fewer to a person I know. State that I am testing or offering a focused, accurately described service; name the buyer type and process problem; and ask for an introduction only if it is genuinely relevant. Give an easy way to decline and say that I will not contact anyone unless the introducer considers it appropriate or makes an introduction.

Do not imply endorsement, demand a referral, claim scarcity, or mention a client result I cannot support.

My permitted context: [relationship; truthful service stage; buyer type; process problem; entry offer; any boundaries].

23. Plan a target-account list without creating a contact database

Use with: company criteria and public research sources. Do not request personal email addresses, phone numbers or data scraping.

Apply the Pack Guardrails.

Act as a prospecting-research planner. Produce a 20-row target-account research template, not a personal contact list. For each verified company I supply, or otherwise for an organisation profile, include: fit reason; likely process-owner role; public evidence to verify; potential first channel; corporate/individual subscriber status to check; and fit level (strong, medium, stretch).

Add a method for finding more organisations through lawful public research, plus a pre-contact checklist covering accuracy, data minimisation, PECR/UK GDPR assessment, privacy information, opt-out/suppression and platform terms. Do not invent company facts or named contacts.

My permitted context: [positioning sentence; geography; sectors; company-size criteria; verified organisations/sources if available].

24. Plan a sustainable weekly pipeline rhythm

Use with: your actual capacity, client delivery commitments, permitted channels and compliance workload. This produces a calendar for review, not a sending quota or growth target.

Apply the Pack Guardrails.

Act as a small-business operations coach. Create a one-week pipeline rhythm that fits my available time and existing delivery/support commitments. Include blocks for research, compliance checks, human-reviewed drafting, relevant follow-up, conversations, record keeping and one useful public insight. Do not set a target for meetings, sales or revenue.

Give a simple scorecard with consistent definitions and denominators for: distinct organisations researched; contacts assessed as permitted; messages manually approved/sent; replies; qualified conversations; proposals; objections/opt-outs; and time spent. Recommend a review date and one variable to test, with immediate correction for misleading messages or compliance concerns.

My permitted context: [weekly capacity; delivery/support commitments; buyer; channels assessed as permitted; current pipeline counts; constraints].

6. Discovery, proposals and decisions

25. Build a discovery-call structure

Use with: an approved positioning sentence, offer boundaries and desired learning. Do not treat this as a script to pressure a buyer into a decision.

Apply the Pack Guardrails.

Act as a consultative discovery-call designer. Create a 30-minute call structure with timed sections, eight diagnostic questions and neutral transition lines. The questions should establish the current process, recent examples, consequence, ownership, systems, data authorisation, decision criteria, budget/timing context and reasons not to proceed.

Include a decision close that can lead to a paid assessment, a scoped proposal, another stakeholder conversation or a respectful stop. Do not promise a result, describe unverified savings, or push a buyer to buy during the call. Add a note to avoid recording or processing personal data beyond what is necessary.

My permitted context: [positioning; assessed offers; known buyer problem; exclusions; qualification concerns].

26. Prepare a focused discovery-call brief

Use with: your own verified, public research and permissioned notes. Do not paste confidential documents, personal profiles or sensitive client data.

Apply the Pack Guardrails.

Act as a sales-research editor. Create a one-page preparation brief using only the verified information I provide. Include: three facts with source/date fields; a clearly labelled problem hypothesis; two questions that would test it; one non-intrusive opening observation; a likely objection framed as a hypothesis; and a safe response that does not overpromise.

Separate “known” from “assumed”. If my evidence is thin, say so and provide questions rather than inventing detail. Do not infer personal circumstances, financial health or technology use beyond the supplied sources.

My permitted context: [company and role; verified public information with dates; how the call arose; positioning; relevant offer boundary].

27. Respond to a prospect objection with useful questions

Use with: the exact objection, agreed facts and offer scope. Do not invent guarantees, discounts or technical claims.

Apply the Pack Guardrails.

Act as a consultative objection-handling editor. Explain up to three plausible underlying concerns as hypotheses, not facts. Draft two responses of 70 words or fewer that acknowledge the concern, state the relevant boundary or evidence needed, and invite a clarifying question. Then give one open question that helps decide whether to revise scope, provide evidence, involve a specialist or stop.

Do not discount by default, become defensive, guarantee outcomes or claim that AI removes risk. If the objection concerns privacy, security, regulated decisions or a contract, flag the appropriate specialist review.

My permitted context: [exact objection; offer; confirmed scope/price basis; evidence; known client constraints].

28. Draft a post-call follow-up for human review

Use with: accurate call notes and an assessed offer. Do not publish client information or set an artificial deadline.

Apply the Pack Guardrails.

Act as a follow-up email editor. Draft a message of no more than 160 words with: a subject referencing the conversation; a factual recap in the prospect's own supplied language; a recommended next step with the offer, price basis and timeline assumptions; a link placeholder; and a clear, non-pressured action.

Mark any client statement, price or deadline that was not confirmed as "verify before sending". Do not say the buyer agreed to something they did not agree to, promise outcomes, or use urgency unsupported by the conversation.

My permitted context: [redacted call notes; agreed next step; offer; confirmed/illustrative price and timing; link; any follow-up date actually agreed].

29. Draft an assessment proposal outline

Use with: confirmed discovery notes and scope; a qualified adviser should review binding terms. This is not a ready-to-sign legal agreement.

Apply the Pack Guardrails.

Act as a proposal editor. Draft a concise assessment proposal outline, under 350 words, that states the problem to investigate, purpose, deliverables, evidence inputs, client responsibilities, exclusions, price basis, timetable assumptions, acceptance/review point, ownership and next decision. Include a sentence that the assessment may recommend an AI, non-AI or process-change option.

Separate commercial terms needing confirmation from the narrative. Include placeholders for applicable contractual, privacy, security, VAT and payment terms rather than inventing them. Do not claim that it is signable without review or that an assessment guarantees a build.

My permitted context: [problem; buyer; inputs; deliverables; exclusions; price basis; timing; dependencies; owner; risks].

7. Controlled delivery and handover

30. Draft a pilot scope and acceptance record

Use with: a signed/approved statement of work or provisional scope. Never paste credentials, unredacted data or security architecture.

Apply the Pack Guardrails.

Act as a delivery lead. Draft a one-page pilot scope and acceptance record. Include: intended outcome; supported inputs; exact deliverables; prohibited actions; out-of-scope list; source-data permission; environment/account ownership; least-privilege permissions; named human reviewer; test cases and expected results; escalation

route; manual fallback; monitoring; change-control path; and evidence for accept/extend/revise/stop.

State clearly that human review is required before consequential external actions and that pilot acceptance is not a compliance certification or automatic production release. Include a client acknowledgement placeholder, but say suitable contractual terms must be reviewed separately.

My permitted context: [project; intended task; allowed inputs; client expectation; systems; risks; reviewer; known changes requested].

31. Create a day-zero kickoff agenda

Use with: a reviewed pilot scope and named participants. No action begins simply because the agenda exists.

Apply the Pack Guardrails.

Act as a project-kickoff facilitator. Build a 60-minute agenda that confirms scope, client responsibilities, data permissions, approved environment, access method, test plan, human review, incident/escalation contacts, manual fallback, communication cadence, change control and next checkpoints.

Identify the exact point where the group reviews the scope/acceptance record and records any unresolved item. End with an action list containing owner, date and pause condition. Do not set a delivery promise or start work before required access, permissions and approvals are in place.

My permitted context: [project; client roles; draft scope; dependencies; dates to confirm; approval/security concerns].

32. Draft a mid-pilot progress update

Use with: verified work completed, open dependencies, test observations and next checkpoint. Do not call the project “on track” unless evidence supports it.

Apply the Pack Guardrails.

Act as a client-communication editor. Draft a calm progress update of no more than 150 words. Start with a factual status label: on track, at risk, paused or needs decision. Then state completed work, next work, evidence or tests observed, any client input needed, and the next scheduled checkpoint.

Separate facts from estimates. Mention any permission, data-quality, safety or scope issue early. Do not conceal an issue, promise completion, or report a performance result from an unrepresentative demonstration.

My permitted context: [completed work; test observations; open risks; client inputs required; next checkpoint; approved wording constraints].

33. Respond to a mid-pilot change request

Use with: the exact request, original scope and early estimate. Do not silently add work.

Apply the Pack Guardrails.

Act as a delivery manager. Draft: (1) a warm response of no more than 100 words that recognises the idea and explains its relationship to current scope; (2) a change-request outline with proposed outcome, assumptions, effect on risk, dependencies, indicative price/timing fields marked “to confirm”, and decision options; and (3) an internal check for retesting, permissions and acceptance criteria.

Do not present an unestimated change as free, call it “Phase 2” automatically, or invent a fixed price. Keep the original pilot focused until the change is formally approved.

My permitted context: [exact request; current scope; known effort/dependencies; client priority; safety or data implications].

34. Draft a responsible handover note

Use with: actual delivery evidence, known limitations, support arrangements and client approval status. Do not create a testimonial or claim success without permission and evidence.

Apply the Pack Guardrails.

Act as a delivery-handover editor. Draft a handover message of no more than 180 words and a separate acknowledgement checklist. State what was delivered, the agreed acceptance evidence, actual observations with sample/limitation where relevant, permitted-use boundaries, account/asset ownership, monitoring/support owner, how to disable the workflow, manual fallback, unresolved issues and next review.

Include a separate optional question asking whether the client wishes to discuss a factual case study after results and wording have been agreed. Do not ask for a quote, referral or retainer as a condition of handover; do not claim production readiness or compliance certification unless this has been explicitly and appropriately approved.

My permitted context: [delivery evidence; success/acceptance criteria; limits; known issues; ownership; support; fallback; client-approved wording].

8. Evidence, support and continuous learning

35. Create a truthful case-study outline

Use with: client permission, agreed wording and measured evidence. If these are unavailable, create an internal learning record instead.

Apply the Pack Guardrails.

Act as an evidence-led case-study editor. First check whether I have client permission, a measurement window, verified results and approved attribution/quote. If not, produce an internal, anonymised learning record and list what is missing; do not create public-facing proof.

If the checks pass, write a one-page case-study outline with: buyer context; problem; intervention; measurement method/window; actual result; review/exception work; limitations; and only the quote I supply and am permitted to use. Distinguish pilot observations from sustained production performance, capacity from cash benefit, target from result and fact from interpretation.

My permitted context: [permission status; approved anonymisation/attribution; problem; delivery; measurement data; limits; approved quote, if any].

36. Draft a support proposal around an actual need

Use with: a completed handover, observed support need, service boundaries and account ownership. Do not presume every client needs a retainer.

Apply the Pack Guardrails.

Act as a service-continuity editor. Draft a proportionate support proposal based on the actual need I provide. Cover included maintenance/monitoring/reporting activities, responsibilities, response arrangements, exclusions, usage or third-party costs, change control, access/ownership, exit or handover arrangements, and price basis/timing marked to confirm where needed.

Offer alternatives such as client-owned operation, limited support or an ongoing arrangement. Do not promise “passive” income, unlimited work, automatic quarterly builds, uptime, compliance or future performance. Flag any contractual terms needing professional review.

My permitted context: [completed workflow; actual need; support tasks; account ownership; capacity; price basis; exclusions; client preference].

37. Ask for a relevant introduction after value is demonstrated

Use with: a resolved delivery position and a specific, optional scenario. Do not solicit referrals while issues remain open.

Apply the Pack Guardrails.

Act as a relationship-based referral editor. Draft one optional message of no more than 100 words. Thank the client for the completed work, acknowledge any agreed observation period, and ask whether they know a specific role or organisation type with a similar process challenge. Make a forwardable blurb optional and state that there is no obligation.

Do not imply that the client endorses me, ask them to disclose someone's details without an introduction, claim a proven result beyond the evidence, or send the request if unresolved problems remain.

My permitted context: [client-approved status; actual result/limits; similar buyer/process; open issues check; optional forwardable blurb].

38. Run a seven-part agency self-review

Use with: a candid, high-level operating snapshot. Do not include confidential client data, named staff performance issues or sensitive financial information.

Apply the Pack Guardrails.

Act as a practical business-review facilitator. Assess seven areas from 1–5: service model/capability; buyer/problem evidence; offer/scope; pricing/delivery economics; pipeline compliance/quality; delivery/quality assurance; and support/evidence/relationships. A 1 means not yet defined; 3 means a usable draft; 5 means evidence-supported and working in practice.

For each score, cite only the information I supplied, identify the missing evidence and suggest one controlled action. Name the lowest-confidence area for the next review period and give three actions with an owner role and review date. Scores are an internal focus tool, not a measure of business value or a forecast.

My permitted context: [one paragraph for each of the seven areas; current constraints; evidence; assumptions; desired review date].

39. Run a weekly agency review

Use with: consistently defined, aggregate weekly numbers and notable observations. Keep forecasts separate from actuals.

Apply the Pack Guardrails.

Act as an operations coach. Read back my weekly scoreboard using these definitions where available: distinct organisations researched; contacts compliance-checked; messages manually approved/sent; replies; qualified conversations; proposals; paid engagements; delivery/support load; opt-outs/objections; direct costs; and material quality or security issues.

State what the data can and cannot show given the sample and date range. Identify one channel, process or risk needing attention, then set three ranked, controllable priorities for next week with an owner role and review date. Do not infer conversion, demand, profit or product quality from too little data; do not create automatic outreach deployment.

My permitted context: [this week's aggregate numbers with definitions/date range; notable events; delivery commitments; compliance/quality issues; next-week capacity].

A practical 90-day learning sequence

Use this as a **sequence of decisions**, not a guaranteed launch plan. Move forward when evidence and capacity support it; pause, narrow, partner or stop when they do not.

Weeks 1–2: choose and validate

Use prompts 1–9. Choose one model, buyer and process. Record skill gaps. Run problem conversations and distinguish observed facts from assumptions. Do not buy a large tool stack or claim results before you can explain the task, data, reviewer and fallback.

Weeks 3–4: define and test an offer

Use prompts 10–17. Create an Assess–Pilot–Support outline, test delivery cost and document what needs confirmation. Use narrowly targeted, UK-aware research and outreach only after compliance checks. A relevant conversation, an objection and a decision not to proceed can all be useful evidence.

Weeks 5–8: deliver only controlled work

Use prompts 25–34 if there is a suitable, authorised engagement. Confirm the scope, permitted data, tester, human reviewer and manual fallback before build. **Fictional teaching example:** a small facilities firm might trial internal routing suggestions for three queues, with uncertain or urgent messages always kept for a person. It would not automatically send messages, quote prices or change a customer record.

Weeks 9–12: review and decide

Use prompts 35–39. Compare actual delivery time, direct cost, review workload, error/fallback rate and buyer feedback with original assumptions. Decide whether to continue, narrow, change buyer group, add specialist support or stop. Do not turn a short pilot observation into a lasting case-study claim.

AI, data-protection and outreach reminders

AI workflow boundaries

For any client workflow, define the permitted task and what it must never do. Use only authorised data. Keep permissions as restricted as the task allows. Test common, edge and failure cases; hold some cases back from refinement where sensible. A model response can be plausible and wrong, so consequential outputs need a proportionate human reviewer, escalation route and manual fallback.

For systems that act on live records or accounts, do not rely on a demonstration. Establish ownership, access control, audit logging appropriate to the task, rollback/disable steps, support responsibility and change control. Where personal data is involved, determine the relevant controller/processor roles, purpose, lawful basis, retention and provider terms. The ICO explains that AI uses involving high risk can require a DPIA, assessed case by case; a DPIA is an accountability tool, not a badge of compliance.²

Do not describe retrieval from approved documents as “training on client data” unless that is technically and contractually accurate. Explain whether the system retrieves documents at runtime, follows instructions, or uses a separate training process. Check the provider’s current data, retention and contractual terms before implementation.

UK outreach boundaries

UK B2B marketing is not a single rule. PECR electronic-mail rules differ between corporate subscribers and individual subscribers. Sole traders and certain partnerships are treated as individual subscribers. Named business-contact data can still be personal data, so UK GDPR duties such as a lawful basis, privacy information and respect for objections remain relevant.¹

Keep an accessible suppression record, honour objections and opt-outs, screen future campaigns against it and do not disguise identity. Telephone and automated-call rules are different again; check the relevant ICO guidance and registers before calling. This pack does not decide your legal position. The ICO has marked both the B2B marketing and AI/data-protection guidance as under review, so use the current official material and seek advice for your circumstances.¹

Current OpenAI implementation note

If a client integration uses OpenAI, do not build new work from an Assistants API tutorial. OpenAI states that the Assistants API was officially sunset on **26 August 2026** and directs new integrations to the Responses API. Check the live documentation, provider terms, model behaviour and security design before implementation.³

References

1. [Information Commissioner's Office — Business-to-business marketing](https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/)
<https://ico.org.uk/for-organisations/direct-marketing-and-privacy-and-electronic-communications/business-to-business-marketing/>
2. [Information Commissioner's Office — Guidance on AI and data protection](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/)
<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/artificial-intelligence/guidance-on-ai-and-data-protection/>
3. [OpenAI — Assistants migration guide](https://developers.openai.com/api/docs/assistants/migration)
<https://developers.openai.com/api/docs/assistants/migration>

Editorial verification date: 9 October 2026. Recheck the linked official guidance and provider documentation before implementation.