

The Prompt Check

Four habits to run before any AI-assisted work reaches a customer or colleague.
After a few days, it takes about 30 seconds.

1 Protect

What am I about to paste?

- No customer names, account numbers, or balances
- No employee or HR details
- No unreleased or confidential business information
- Describe the situation in general terms instead

2 Prompt

Did I say what I actually need?

- Give it a role, context, a clear task, and a format
- Use one clear verb: draft, summarize, rewrite, compare
- If the answer misses, reply with what to change

3 Probe

What could be wrong here?

- Verify every rate, fee, date, name, and policy reference
- Read it as the person receiving it: is the tone right?
- Add context the assistant couldn't have known

4 Polish

Does this sound like me?

- Adjust the greeting and closing
- Add the detail only you know
- Cut anything you wouldn't say yourself
- You own what you send

BUILD A STRONG PROMPT

Role	Context	Task	Format
Who should it be?	What's going on? Who's the audience?	What exactly should it do?	Length, tone, structure

TRY THIS

"You're a friendly bank service rep. A long-time customer is upset about an overdraft fee. Write a short, warm email that explains the fee and offers a one-time courtesy refund. Keep it under 120 words, no jargon."

BEFORE YOU PASTE

Keep it out

- Customer names, account and loan numbers
- Photos or scans of customer documents
- Performance reviews, salaries, personnel issues
- Unreleased financials, deal terms, legal or security details

OK to share

- Public product details from our website
- Your own notes, with names removed
- General procedures you want rewritten in plain language
- Routine emails with no customer data

Rule of thumb: if it identifies a person, or it isn't public yet, keep it out.