

Build Your Own Custom GPT

Your step-by-step guide to creating an AI coworker for your business

During the demo, we built a Custom GPT who helps with searching, tasks, and emails so you can focus on higher-value work.

Now, here's how you can build your *own version* for your business or team. Feel free to copy and paste the instructions we've provided and customize them for your tasks and team!

Step 1: Start With a Purpose

Every great GPT starts with clarity.

1. Go to chat.openai.com and log in.
2. In the left-hand menu, click **Explore** under **GPTs** → then **Create** in the upper right.
3. You'll enter the **Custom GPT Builder** workspace where you can switch from the Create tab (ChatGPT helps you build the GPT) to the Configure tab (we'll build the GPT ourselves).

Now give your GPT:

- **A name** – something descriptive (e.g., *Inbox Ally*, *The Task Whisperer*, *Note Ninja*).
- **A short description** – what it helps with (e.g., *"Summarize meetings, manage follow-ups, and draft professional emails."*)

💡 Think of this as writing a job title and job description for your AI coworker.

💡 Also feel free to upload an image to represent this GPT or use the "Use DALL-E" option to let ChatGPT make one for you.

Step 2: Write Clear Instructions

Your GPT's instructions are its *operating manual* — what tells it how to think and act.

You'll find the main editing area labeled **"Instructions"** (this is your GPTs brain).

Add these sections inside that box:

Context

Explain who your GPT is, who it helps, and what it does.

"You are an AI coworker that helps [your department] handle [specific tasks] so employees can focus on [business goals]. Always use information provided by the user or uploaded files."

Voice & Style

Define how it should sound.

"Be friendly, concise, and professional. Use plain language. Mirror the user's tone."

General Behavior

Explain how it should work.

"Ask clarifying questions if something is missing. Outline reasoning before conclusions. Keep answers short and focused."

Guardrails

Add your boundaries.

“Do not use outside or speculative information. Stay on work-related topics.


If Jerry asks about zebras — politely redirect him back to work.”

Custom Instructions *(optional)*

If you want, you can include any additional instructions related to your Custom GPTS tasks or your business.

Include the type of products or services you offer or tell it about the software your employees use.

Feel free to get creative here!

 *Tip: Use the included instructions file to paste the exact instructions from our demo.*

Step 3: Add Knowledge Files


Your GPT can reference internal files to become context-aware.

**** Only add these files if your company is using ChatGPT Enterprise. Do not upload company files to your personal ChatGPT.****

1. In the “**Knowledge**” section, click **Upload Files**.
2. Attach the files you want your Custom GPT to have access to when responding to your users.

Good examples include:

- **OrgChart.txt** – team names, roles, and reporting lines.
- **ProjectGlossary.txt** – major initiatives, timelines, and dependencies.
- **CompanyPolicyGuide.txt** – HR, travel, and data policies.
- **FAQ_Operations.txt** – where things live and how to find them.
- **Templates.txt** – sample reports, messages, or status update formats.

 *Keep file names simple and contents organized — text files read faster and are easier for GPTs to process than PDFs or images.*

Step 4: Test and Tune

You’re ready to test your GPT! You can use the **Preview** section to start chatting.

Try a few real-world prompts:

- “Summarize this meeting transcript.”
- “Who’s responsible for Project Harbor?”
- “Remind me of our travel-approval process.”
- “Write a 100-word client update in our company tone.”

If the answers aren’t quite right:

1. Go back to **Instructions**.

2. Refine your phrasing.
3. Test again until it consistently performs how you want.

💡 *Each small edit helps your GPT sound more like your team.*

Step 5: Share It With Your Team

Once your GPT is trained and ready:

1. Click **Create** in the top-right corner of the Builder.
2. Choose **Private** (just for those you invite), shared within your **Organization** (if you have an business plan), or **Public** (anyone can use it).
3. Copy the GPT link and share it with your coworkers.

🎉 *You've officially created your first AI coworker!*

💬 Example Use Cases

Here are a few things your own GPT — can do:

- Summarize meetings and identify key decisions.
- Track owners, action items, and due dates.
- Reference internal policy automatically.
- Locate project info or file paths instantly.
- Politely remind Jerry to stop asking about zebras. 🦒

💡 *Replace our files and context with your own, and your GPT becomes uniquely yours.*
