

# Prompt planning *worksheet*

Plan a request to ChatGPT or Claude in six steps, then use the checklist to review what comes back. Don't write confidential or personal customer information on this sheet or in your prompt.

## PART 1 · PLAN THE REQUEST

### 1 Goal

What do you want at the end? Describe the finished output, not the task.

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### 2 Audience

Who will read or use it, and what do they already know?

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### 3 Context

What background does the assistant need? Paste or describe it.

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### 4 Constraints

Length, tone, format, words to avoid, deadlines.

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### 5 Format

How should the answer be laid out?

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### 6 Example

Is there a good example of what you want? Describe or paste it.

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## PART 2

### Review what comes back

- ☐ Every fact, figure and name is checked against the source
- ☐ Nothing confidential or personal went into the prompt
- ☐ It answers the goal you wrote above
- ☐ The tone suits the audience
- ☐ It is the right length and format
- ☐ You would be comfortable putting your name to it
- ☐ You know what you will change before you use it

If any box stays unticked, revise the prompt or edit the output before you use it.

## PUT IT TOGETHER

I need [goal] for [audience]. Here is the background: [context]. Keep it [constraints], laid out as [format]. Here is an example of what works: [example]. Before you start, ask me anything you need to know.