

TAKE-HOME GUIDE

Build your agent.

You design how AI works for you. By the end of this, you'll have an agent that does one real job, your way, without you re-explaining it every time.

STEP 01

Pick one task you'll do again

Something you do more than once. If you'd explain it the same way every time, it's a good agent. Need a starting point? Steal one.

SALES

Lead follow-up drafter

Turns a new inquiry into a personal follow-up that answers what they actually asked.

OPERATIONS

Process documenter

Turns your notes on how something gets done into a clean, numbered step-by-step.

CUSTOMERS

Complaint sorter

Splits a messy complaint into separate issues, labels each one, and drafts a reply.

FINANCE

Variance explainer

Turns budget vs. actual numbers into a plain-English note for whoever needs it.

MARKETING

Campaign angles

Turns a product or offer brief into three campaign ideas for different audiences.

ANYONE

Meeting notes to actions

Turns messy notes into decisions, owners, and due dates.

My task

STEP 02

Write the blueprint

This is the designer part. Fill these in before you open Gemini. Keep it short and specific.

Name

What will you call it?

Persona

"You are a..." Who is it acting as?

Task

What does it do every time you open it? Start with a verb.

Context

Who are you, who is it for, and what should it know?

Format

What should the answer look like? Bullets, table, length, tone.

Guardrails

What should it never do? When should it stop and ask you?

THE FUNDAMENTALS

How to talk to AI

Google's own prompting guide says to think about four things: Persona, Task, Context, and Format. I add a fifth, because designers set limits. Here's how to remember all five.

Pretty Tired College Folks Graduate.

PERSONA · TASK · CONTEXT · FORMAT · GUARDRAILS

P	Persona Who should it act as?	<i>"You are an operations manager who writes clear, short process docs."</i>
T	Task What should it do? Start with a verb.	<i>"Turn my notes into a numbered step-by-step."</i>
C	Context What does it need to know?	<i>"I run a small team. The doc is for a new hire on day one."</i>
F	Format What should the answer look like?	<i>"Numbered steps, one sentence each, under 15 steps."</i>
G	Guardrails What should it never do? When should it ask?	<i>"Don't invent steps. If something is unclear, ask me first."</i>

SEE THE DIFFERENCE

Same request, two ways

BEFORE <i>"Write up how we onboard a client."</i> You get a generic checklist that could belong to any business.	AFTER <i>"You are an operations manager who writes clear process docs. Turn my notes below into a numbered onboarding checklist for a new hire. One sentence per step, under 15 steps. Don't invent steps. If anything is unclear, ask me first."</i>
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LEVEL UP

Moves that make any prompt better

Plan before you build For anything bigger than a quick answer, say "Before you start, give me your plan." Check the plan, fix it, then let it go.	Make it ask you questions End with "Ask me 5 clarifying questions before you answer." The questions show you what you left out.	Show it what good looks like Paste one or two examples of the result you want. I do this all the time. It's the fastest fix I know.	Evaluate, then iterate Read the answer like a reviewer. Is it right? Is it what you asked for? If not, add context, break the task into steps, or reword it.
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STEP 03

Build it in Gemini

In Gemini, a saved agent is called a Gem. Free on a personal Google account. If your business runs on Google Workspace, ask your admin whether Gemini is turned on.

- 01 Go to gemini.google.com and sign in.
- 02 Click your profile picture (bottom left), then Gems. Or go straight to gemini.google.com/gems/view.
- 03 Click New Gem and add the Name from your blueprint.
- 04 Paste your Persona, Task, Context, Format, and Guardrails into Instructions.
- 05 Optional: click the wand (Use Gemini to re-write instructions) to expand a rough draft. Read it and cut anything that doesn't sound like you.
- 06 Optional: under Knowledge, add a file it should always use. Keep it short. Nothing confidential, and nothing your company hasn't approved for AI.
- 07 Test in the preview on the right. It doesn't save on its own. Then click Save.

COPY THIS

Agent instruction template

PERSONA

You are a [role] who helps [who] with [what].

TASK

Every time I give you [input], you [do this].

CONTEXT

I am a [role] at a [type of business]. The output is for [audience]. They care about [what matters].

FORMAT

Respond with [bullets, a table, or short paragraphs]. Keep it under [length]. Tone: [plain, direct, friendly].

GUARDRAILS

If information is missing, ask me before you guess. Don't make up numbers or sources. Flag anything you're unsure about.

Save your instructions in a doc. With them written down, you can rebuild this agent anywhere, or paste them into any AI chat, including Copilot.

STEP 04

Test it, then try to break it

Don't trust the first answer. Run two real prompts, then one that pushes it. Vague, off topic, or missing information.

Test prompt 1	Test prompt 2	Break-it prompt
What I changed in the instructions		

STEP 05

Step back and think like a designer

You just built on the Define rung. Most work never needs to go higher. Circle where this task could go next, if it should go anywhere at all.

A Ask You drive	D Define You drive	A Automate It runs	P Pair You partner	T Trigger It fires
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What would it need to climb one rung?

One task in my week that should never use AI, and why

WHEN IT'S NOT WORKING

Quick fixes

It keeps guessing Add to Guardrails: "If anything is unclear, ask me first."	It's too long Put a hard limit in Format: "5 bullets max, one sentence each."	You keep fixing the same thing That fix belongs in the Instructions, not the chat. Edit the Gem and save.
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USE IT WISELY

The guardrails

- ☐ Keep personal and confidential info out. No passwords, account numbers, or anyone's private details. Work data stays in the tools your company approves.
- ☐ Check the work. AI can be confidently wrong. Verify numbers, names, and sources before anything leaves your hands.
- ☐ Get other eyes on it. Have someone else try it before the team relies on it.
- ☐ Ask people what they need. Before you build something for a team, ask them. Build for the problem they actually have.
- ☐ Not everything needs AI. If it follows the same rule every time, a simple automation or checklist usually works better.

Not sure what to build first?

Take the Bottleneck Playbook. Six questions, and you'll know where your business is actually stuck.

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