

## TL;DR Quick Start: ChatGPT For Account Management

Task	Description
Pick Core Tasks	Focus on repetitive or structured work like emails, reports, meeting summaries, or client insights.
Use Clear Prompts	Include client context, key points, tone, and format. Example: "Write a professional email to [Client Name] summarizing today's discussion. Include key points: [insert points], keep it friendly and concise, and end with a clear next step."
Integrate With Systems	Copy outputs to your CRM, email, or task manager to automate follow-ups.
Leverage Advanced Prompts	Cover contract prep, strategy planning, client agendas, KPIs, event planning, and risk/opportunity analysis.
Review & Personalize	Skim reports for accuracy and add your own commentary, especially around sensitive KPIs. Check accuracy, tone, and context.
Track Impact	Monitor time saved, fewer errors, and better client communication.

## Practical ChatGPT Use Cases (Prompts in Separate Column)

Use Case	Prompt
Drafting Client Emails	Write a professional email to [Client Name] summarizing our discussion from today. Include points: [insert points]. Keep tone friendly and concise. End with a clear next step and thank-you note.
Creating Weekly/Monthly Reports	Create a weekly client report for [Client Name]. Include key metrics, project updates, risks or opportunities. Format in sections with bullet points and a one-paragraph summary at the top.
Generating Meeting Summaries & Action Items	Summarize meeting notes with [Client Name]. Highlight all action items, deadlines, and owners. Present in 3-4 concise bullet points for the team.
Producing Risk & Opportunity Analysis	Review notes from [Client Name] and identify potential risks or opportunities. Provide short summary with suggested actions for each point.
Maintaining Consistent Messaging	Ensure client communications maintain professional tone. Rewrite where necessary while keeping original meaning intact.

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**Best Practices Prompts (Separate Column)**

Best Practice	Prompt
Provide Contextually Rich Prompts	Draft an email to [Client Name] summarizing this week's project updates. Highlight delays, upcoming deadlines, and next steps. Tone: professional but approachable.

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**12 Advanced ChatGPT Prompts (Each in Separate Column)**

Prompt Number	Task	Prompt
1	Contract Renewal Preparation	Summarize contract status, highlight discussion items, provide checklist for [Client Name].
2	Quarterly Strategy Alignment	Draft strategy plan with initiatives, action items, responsible team members, expected outcomes for [Client Name].
3	Client Meeting Agenda Builder	Create agenda with discussion topics, decision points, attendees, time allocation, introduction for [Client Name].
4	Onboarding Progress Tracker	Track completed steps, pending items, responsible owners, highlight bottlenecks for [Client Name].
5	Internal Team Briefing	Include key priorities, deadlines, dependencies, risks, summary for quick review for [Client Name].
6	Competitive Insights	Analyze competitor activity, highlight risks/opportunities, provide actionable recommendations for [Client Name].
7	Client Event/Workshop Planning	Plan objectives, agenda, resources, owners, post-event follow-up for [Client Name].
8	Custom KPI Dashboard Notes	Summarize KPIs, trends, deviations, recommended actions for [Client Name].
9	Issue Resolution Follow-Up	Draft follow-up plan with timelines, responsible members, next steps, communication plan for [Client Name].

Prompt Number	Task	Prompt
10	Quarterly Insights & Recommendations	Summarize achievements, challenges, opportunities, actionable recommendations for [Client Name].
11	Stakeholder Mapping	List stakeholders, roles, influence, communication preferences, engagement strategy for [Client Name].
12	Budget Tracking & Oversight	Review budget/expenses, highlight overspending, suggest corrective actions, summarize financial risks/opportunities for [Client Name].