

WOMEN IN DIGITAL ACADEMY

AI ACCELERATOR

BUILD, APPLY, LEARN

WEEK 3: CUSTOM AI ASSISTANTS & KNOWLEDGE SYSTEMS

Wednesday 8 April 2026 | 12:00pm AEST

Dr Nici Sweaney | AI Her Way

ai
HERWAY 

A cup of coffee on a saucer with a laptop and glasses in the background.

YOUR PROMPTS ARE GREAT.

**NOW LET'S MAKE THEM
PERMANENT.**

QUICK RECAP & CHECK-IN

WHAT WE COVERED IN WEEK 2 AND HOW YOUR HOMEWORK WENT



ROSE-T METHOD

Structured prompting for consistent outputs



ADVANCED TECHNIQUES

Chain-of-thought, few-shot, constraining



PROMPT LIBRARY

Your personal collection of best prompts



TIME AUDIT

Baseline vs AI-assisted task completion

CHECK-IN:

- How did your ROSE-T prompts go? Any surprises?
- What was your time saving when you re-timed a task with AI?
- Did anyone catch AI getting something wrong? What happened?

TODAY

01



WHAT ARE CUSTOM ASSISTANTS?

From prompts to persistent
bots

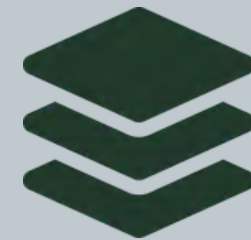
02



WRITING YOUR ROLE CARD

The six sections that define
your assistant

03



THE TWO- TRACK APPROACH

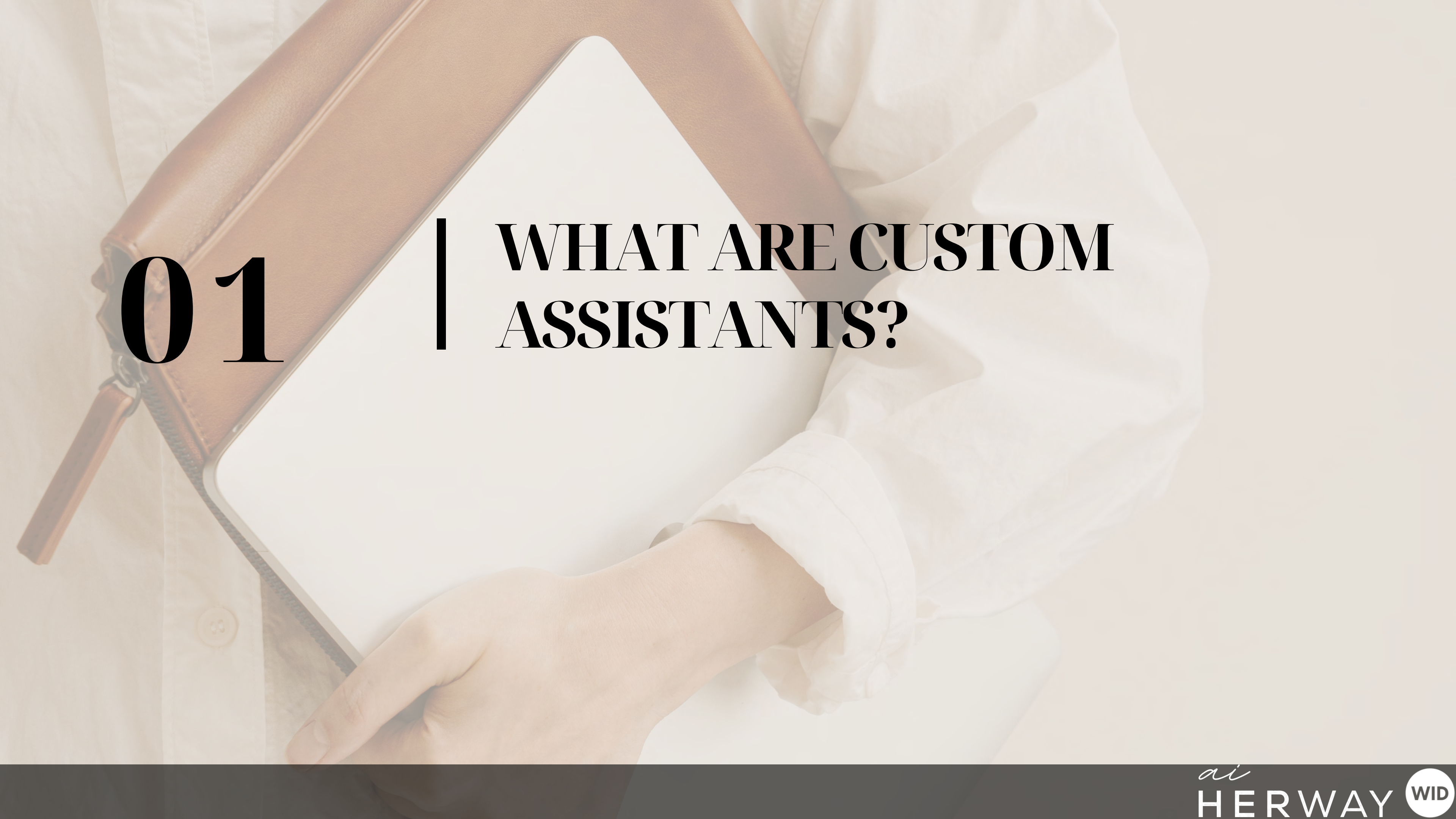
Paid tools & free
alternatives

04



GOVERNANCE, TESTING & ACTION

Data safety & your
homework



01

WHAT ARE CUSTOM ASSISTANTS?

FROM PROMPTING TO PERSISTENT ASSISTANTS

The next step on your AI maturity journey



▲ YOU ARE HERE

THE KEY SHIFT

Prompting: You give instructions every time. Each conversation starts from scratch.

Custom Assistants: You set the instructions once. The AI remembers who it is, what it does, and how you like things done.

THE ANATOMY OF A CUSTOM ASSISTANT

Four components – your Role Card captures them all



SYSTEM INSTRUCTIONS

The personality & rules.
Who it is, how it talks,
what it always/never does.



KNOWLEDGE CONTEXT

The documents & data
it draws from. Style guides,
processes, templates.



CONVERSATION STARTERS

Pre-built entry points
for common tasks.
“Draft an email about...”



GUARDRAILS

What it should and
shouldn't do. Your
non-negotiable rules.

Your Role Card captures all four. Same card works on ChatGPT, Claude, Copilot, or as a Clipboard Assistant.

WHERE CAN YOU BUILD?

Five options – including one that’s completely free

ChatGPT Custom GPTs	Plus / Team / Enterprise	File uploads, persistent memory, shareable
Claude Projects	Pro	Document context, strong reasoning, great for writing
Copilot Custom Agents	M365 Copilot	Integrates with Outlook, Teams, SharePoint
Gemini Gems	Advanced	Google ecosystem, Drive integration
Clipboard Assistant	FREE	Works on any LLM. Nothing stored. You own it.

WHICH SHOULD I CHOOSE?

Already paying for ChatGPT Plus?

→ Custom GPT

Org uses M365?

→ Copilot Agent

Free plan or restricted?

→ Clipboard Assistant

Not sure?

→ Start with Clipboard.
Upgrade later.

02

| WRITING YOUR
ROLE CARD

YOUR ROLE CARD = PERMANENT ROSE-T

Same framework, written once into a Role Card instead of every prompt

ROSE-T	IN A PROMPT	IN A ROLE CARD
R — ROLE	"You are a senior comms manager..."	Section 1: Identity & Role
O — OBJECTIVE	"Draft a 200-word email about..."	Section 2: Core Responsibilities
S — SPECIFICS	"Professional tone, bullets..."	Sections 3–4: Tone & Format Preferences
E — EXPLICIT	"Don't use jargon, end with CTA..."	Section 5: Guardrails (always/never rules)
T — TESTING	"Make this shorter" / "More formal"	Test with 10 queries, refine the Role Card

YOUR ROLE CARD: SIX SECTIONS EVERY ASSISTANT NEEDS

01



IDENTITY & ROLE

Who is this assistant?

02



CORE RESPONSIBILITIES

What does it do? (3–5 tasks)

03



tone & style

How does it communicate?

04



FORMAT PREFERENCES

What should outputs look like?

05



GUARDRAILS

Always do X, never do Y

06



CONTEXT & KNOWLEDGE

Background it needs to know

ROLE CARD SECTION 1: IDENTITY & ROLE

GENERIC ROLES PRODUCE GENERIC OUTPUTS — BE SPECIFIC

WEAK

"YOU ARE A HELPFUL ASSISTANT."

This tells the AI nothing about who it is, what it specialises in, or how it should behave. You'll get bland, generic outputs.

STRONG

"You are a senior communications advisor specialising in internal stakeholder engagement for mid-size Australian government agencies."

Specific role, specific context, specific audience. Every output will be shaped by this identity.

THE SPECIFICITY TEST:

Could a stranger read your Role Card and know exactly what this assistant does, who it serves, and how it communicates? If not, add more detail.

ROLE CARD SECTION 5: GUARDRAILS

The most important part of your Role Card – your non-negotiables

ALWAYS

Flag when you're making assumptions

Ask clarifying questions if ambiguous

Use Australian English spelling

Include a subject line on all emails

Cite sources when referencing data

Add "prepared by AI" caveat on formal docs

NEVER

Share client names or confidential details

Fabricate statistics or research findings

Provide legal or financial advice without caveat

Start emails with "I hope this finds you well"

Use US spelling (organisation, not organization)

Make up information about real people

THE DOCUMENTS AND DATA YOUR ASSISTANT DRAWS FROM

GREAT FILES

- Style guides
- Process docs & SOPs
- Templates & examples
- FAQs & reference
- Product descriptions

USE CAUTION

- Strategy docs (anonymise)
- Meeting notes (remove names)
- Financial summaries
- Staff contact lists

NEVER UPLOAD

- Client data or PII
- Passwords or API keys
- Health or legal records
- Anything classified

Before uploading anything, ask: "Would I be comfortable if this was made public?"

FORMATTING KNOWLEDGE FOR YOUR ROLE CARD

Well-formatted documents produce dramatically better results

FOR FILE UPLOADS

(Custom GPTs, Claude Projects)

- Use .txt, .md, or .docx – these work best
- PDFs can struggle with tables & layouts
- Add title + description at the top
- Use clear headings to separate sections
- Keep each file under 50 pages

FOR CLIPBOARD ASSISTANTS

(paste-ready text blocks)

- Convert docs to plain text blocks
- Keep each block under 2,000 words
- Use === START === and === END === markers
- Remove images & complex tables
- Simplify tables into key-value pairs

LIVE BUILD

WATCH IT COME TOGETHER.

- Creating a Custom GPT from scratch
- Writing a Role Card live using the six sections
- Uploading knowledge files
- Testing with real queries
- Then: the Clipboard Assistant version – side by side

A hand holding a smartphone with a brown case against a white lace background. The text '03 | THE TWO-TRACK APPROACH' is overlaid on the image.

03

| THE TWO-TRACK
APPROACH

TWO TRACKS. ONE OUTCOME.

Everyone leaves today with a working assistant – regardless of your tool or plan

TRACK A

CUSTOM ASSISTANT

(Paid Tools)

- Persistent between conversations
- Upload knowledge files directly
- Shareable with team members
- ChatGPT, Claude, Copilot, Gemini

TRACK B

CLIPBOARD ASSISTANT

(Free Tools)

- Works on ANY free LLM
- Nothing stored in third-party tools
- More secure for enterprise environments
- Transfers to paid tools with zero rework

Same system instructions. Same quality outputs. Same skills. Different delivery mechanism.

HOW THE CLIPBOARD ASSISTANT WORKS

SIX STEPS TO A WORKING ASSISTANT — NO SUBSCRIPTION REQUIRED

1

OPEN ANY FREE AI TOOL

ChatGPT, Claude, Gemini, Copilot

2

START A NEW
CONVERSATION

Fresh context every time

3

PASTE SYSTEM
INSTRUCTIONS

Your permanent identity & rules

4

PASTE KNOWLEDGE BLOCK

Only the one relevant to this task

5

ASK YOUR QUESTION

Or paste a conversation starter

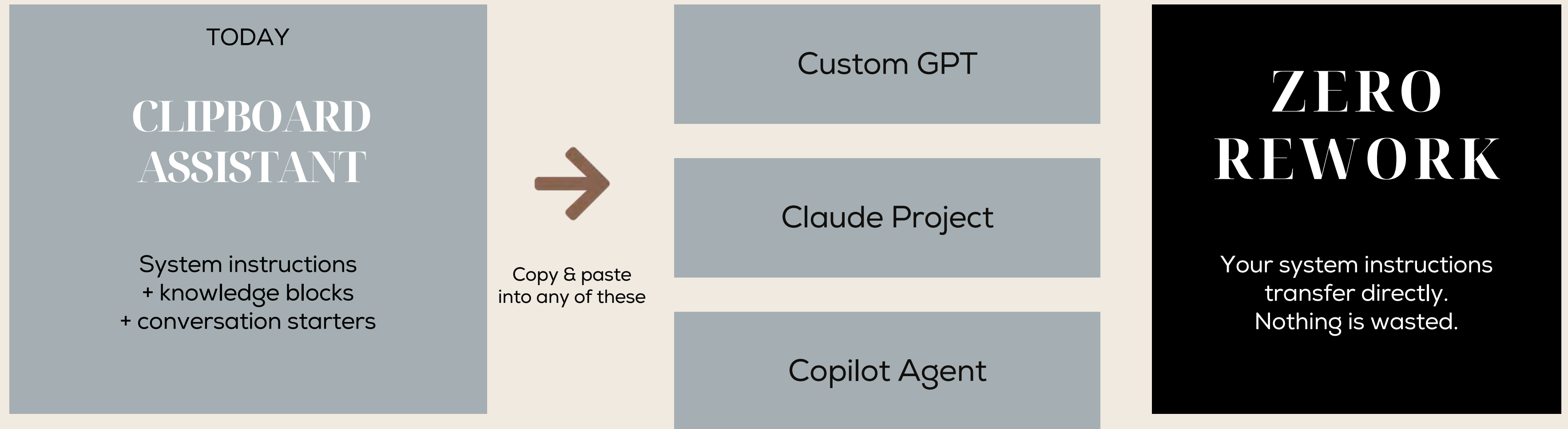
6

SAVE GREAT OUTPUTS

Build your reference library

THE UPGRADE PATH

Start free. Move to paid when you're ready. Zero rework.



USE CASES FOR YOUR FIRST ASSISTANT

PICK ONE THAT YOU DO AT LEAST WEEKLY



EMAIL DRAFTER

Drafts replies, comms, and announcements in your tone and format preferences



MEETING PREP BOT

Creates briefs, agendas, and summaries with action items and owners



CONTENT CREATOR

Writes social posts, articles, and internal content aligned to your brand



RESEARCH ASSISTANT

Synthesises information, compares options, and prepares briefing papers



POLICY ADVISOR

Answers questions about policies and procedures using your org's documents



REPORT WRITER

Structures data into formatted reports, dashboards, and executive summaries

EXERCISE: WRITE YOUR ROLE CARD

15 MINUTES | USE THE ROLE CARD TEMPLATE + WRITING GUIDE

- 1 Choose your use case (one task you do weekly)
- 2 Fill in Section 1: Identity & Role (be specific!)
- 3 Fill in Section 2: Core Responsibilities (3–5 tasks)
- 4 Fill in Sections 3–4: Tone, Style & Format
- 5 Fill in Section 5: Guardrails (3 ALWAYS + 3 NEVER)
- 6 Fill in Section 6: Context & Knowledge

CLONING YOURSELF

Build a bot that handles tasks in your voice and style

The goal isn't to replace you. It's to handle the 80% of tasks that don't need your full attention – so you can focus on the 20% that does.

1

COLLECT YOUR BEST WORK

5–10 examples of emails, reports, or content that represent your voice at its best

2

EXTRACT THE PATTERNS

What makes your writing YOU?
Sentence length, vocabulary, structure, sign-offs

3

BUILD IT INTO YOUR ROLE CARD

"Write like these examples. Match this tone. Use these phrases. Avoid these."

4

TEST AGAINST REAL TASKS

Have a colleague read the output. Can they tell the difference?

A high-angle, close-up photograph of a person's hand with a ring on the ring finger, resting on the keyboard of a silver laptop. The laptop is open and positioned diagonally across the frame. The background is a soft, out-of-focus light beige color.

04

| GOVERNANCE, TESTING
& ACTION

WHAT DATA IS SAFE TO UPLOAD?

PLATFORM	SAFE FOR SENSITIVE DOCS?	WHAT TO KNOW
CHATGPT FREE	NO	Data may be used for training. Turn off in settings.
CHATGPT TEAM/ENTERPRISE	YES	Data not used for training. Stays in your org.
CLAUDE PRO / API	YES	Not used for training.
M365 COPILOT	YES	Data stays within your Microsoft tenant.
GEMINI FREE	NO	Data used for training. Check your Workspace plan.
CLIPBOARD ASSISTANT	N/A	Nothing is uploaded or stored. You control everything.

Rule of thumb: If you wouldn't put it on a billboard, don't put it in a free AI tool.

YOUR ASSISTANT SHOULD PROTECT YOU, NOT EXPOSE YOU

"Never share client names – use Client A, Client B"

Prevents accidental data exposure in outputs

"Always add 'prepared by AI – verify details' to formal documents"

Transparency with stakeholders

"Do not provide legal or financial advice without a caveat"

Manages liability and sets expectations

"If you don't know something, say so. Never fabricate."

Prevents hallucination in critical contexts

"Only use information I've provided. Do not guess."

Keeps outputs grounded in your data

The Clipboard Assistant is actually MORE secure – nothing is stored, nothing is trained on, you control every interaction.

THE 10-QUERY TEST

HOW TO VALIDATE YOUR ASSISTANT ACTUALLY WORKS

- 1 A standard task (the thing you'll use it for most)
- 2 A complex version of that task
- 3 A vague, ambiguous request (does it ask for clarification?)
- 4 A task with specific format requirements
- 5 Something where tone really matters
- 6 A request that should trigger a guardrail
- 7 An edge case or unusual scenario
- 8 Something with Australian-specific context
- 9 A task using knowledge from your uploaded docs
- 10 A deliberately tricky or misleading request

Use (pass), (partial), or (fail) – then refine your Role Card and re-test

EXERCISE: BUILD & TEST YOUR ASSISTANT

20 minutes | Use the Testing Log

TRACK A:

1. Create your custom GPT / Claude Project
2. Paste in your Role Card as system instructions
3. Upload your knowledge files
4. Run 5 test queries and note results

TRACK B:

1. Open the Clipboard Assistant Template
2. Fill in your Role Card sections
3. Prepare one knowledge block
4. Open any free LLM, paste & test 5 queries

YOUR HOMEWORK THIS WEEK



BUILD YOUR AI ASSISTANT (TRACK A OR TRACK B)

This becomes your final showcase project and your daily work tool



CHOOSE A SPECIFIC, RECURRING USE CASE

Something you do weekly that takes 15+ minutes each time



PREPARE AT LEAST 3 KNOWLEDGE DOCUMENTS

Upload or format as paste-ready blocks



COMPLETE YOUR ROLE CARD USING THE SIX SECTIONS

Use the Role Card Template + Writing Guide



TEST WITH 10 QUERIES USING THE TESTING LOG

Refine your Role Card based on where it fails



SHARE YOUR USE CASE + ONE OUTPUT IN SLACK

Which track did you choose and why? What surprised you?

Time estimate: 60–90 minutes | If you get stuck, post in Slack – the Automations Technician is there to help

RESOURCES FOR THIS WEEK

ALL PROVIDED AS WORD DOCUMENTS — READY FOR YOU TO USE



ROLE CARD TEMPLATE

The six-section blueprint for every AI assistant you build



CLIPBOARD ASSISTANT TEMPLATE

The free-tier assistant builder (Track B participants)



SYSTEM INSTRUCTIONS WRITING GUIDE

How to write instructions that work on any platform



KNOWLEDGE BASE PREPARATION GUIDE

How to select, format, and structure your documents



CUSTOM ASSISTANT TESTING LOG

10-query test protocol with reflection section



DATA CLASSIFICATION GUIDE

From Week 1 – review before uploading documents

NEXT WEEK

WEEK 4: CONSOLIDATION & PRACTICAL APPLICATION

Hosted by Women in Digital

- Catch up on homework from Weeks 1–3
- Work on your custom assistant in break-out rooms
- Troubleshoot challenges with peers
- Bridge Weeks 1–3 with the strategy content coming in Week 5

USE THIS TIME. BUILD. TEST. REFINE. ASK QUESTIONS.

Wednesday 15 April 2026 | 12:00pm AEST



THANK YOU

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