

# SET UP YOUR PROFILE

*Custom Instructions That Make AI Work for You*

---

A Practical Guide for AI Curious Minds

Getting Started with Claude, ChatGPT, Gemini, and Copilot

Prepared by

**Jigar B. Desai, PhD, PE, MBA**

[linkedin.com/in/drjigardesai](https://www.linkedin.com/in/drjigardesai)

Prepared for

**CREW Greater Philadelphia**

*Part of the 3½ Things Series*

[Threeandahalfthings.com](https://www.threeandahalfthings.com)

**3½**  
**Things**

## WHY YOUR PROFILE IS THE MOST IMPORTANT PROMPT YOU WILL EVER WRITE

Every major AI tool now offers a way to tell it who you are, how you work, and what you expect before you ever type a prompt. This is where the real leverage is. A well-crafted profile turns every conversation from a cold start into a warm handoff.

Without a profile, you are repeating yourself constantly. You correct the tone. You re-explain your role. You fix inaccurate assumptions. You waste the first three exchanges of every conversation just getting the AI to understand your baseline.

With a profile, you eliminate all of that. **The AI already knows your context, your standards, and your guardrails before you ask your first question.**

### Think of it this way:

Your profile is a standing briefing document. It is the difference between hiring a new associate every morning versus working with a trusted colleague who already knows your market, your clients, and your standards.

## WHERE TO FIND PROFILE SETTINGS

In Claude, navigate to: Settings > Profile > User Preferences (free-form text). This is where you will paste your custom instructions. Everything you write here will persist across every new conversation you start.

Tool	Where to Set It
<b>Claude</b>	Settings > Profile > User Preferences (free-form text)
<b>ChatGPT</b>	Settings > Personalization > Custom Instructions (two boxes)
<b>Gemini</b>	Settings > Extensions and Personalization
<b>Copilot</b>	Copilot automatically pulls from your Microsoft 365 data and context

## WHAT TO INCLUDE IN YOUR PROFILE

Think of your profile as a standing briefing document for a new team member on their first day. Cover these five categories:

### 1. Who You Are

Your role, specialization, market focus, and team context. The AI needs to understand where you sit in the commercial real estate landscape so it can calibrate its responses accordingly.

DO THIS	NOT THIS
<i>"I am a Senior Vice President at a mid-size brokerage, specializing in office leasing in the Philadelphia suburbs. I manage a team of 4 brokers and report to our Managing Director. My clients are institutional owners and mid-size corporate tenants seeking 10,000-50,000 SF."</i>	<i>"I work in commercial real estate."</i>

### 2. How You Communicate

Tone, formality, format preferences, and writing quirks you want enforced. This is where you shape how the AI sounds when it responds to you. Be explicit about what you want and, equally important, what you do not want.

DO THIS	NOT THIS
<i>"Write in active voice. Use full words and avoid contractions. Keep the tone professional but warm, as though writing to a longtime client you respect. Do not use exclamation points or emojis. When drafting property marketing, use a compelling but factual tone."</i>	<i>"Write well."</i>

### 3. What You Value in Outputs

Accuracy standards, source expectations, and how you want uncertainty handled. This is your quality control layer. It tells the AI what "good" looks like for you.

DO THIS	NOT THIS
<i>"Prioritize accuracy. If you are not sure about a market data point, say so rather than guessing. Use specific numbers and examples when possible. I prefer concise summaries that lead with the conclusion before the supporting data. When referencing market trends, use only the most recent data from trusted sources."</i>	<i>"Be accurate."</i>

#### 4. Your Constraints and Boundaries

Industry-specific rules, sensitivities, and professional standards. Every discipline has guardrails. This section prevents the AI from crossing lines it does not know exist.

DO THIS	NOT THIS
<p><i>"Never fabricate statistics, market data, or case studies. Do not name my clients or include confidential lease terms, cap rates, or deal specifics in any output. When I reference zoning codes or municipal regulations, verify the correct jurisdiction and designation. Do not cite specific rental rates unless I provide them."</i></p>	<p><i>"Be careful."</i></p>

#### 5. Your Personal and Professional Context

This is the layer that makes your AI experience genuinely personal. Share the details that allow the AI to tailor responses specifically to you: your expertise areas, your interests, how you approach problems, and what makes your perspective unique. The more specific you are, the less you will need to re-explain yourself across conversations.

DO THIS	NOT THIS
<p><i>"I have 18 years of experience in commercial real estate, primarily in office and industrial leasing. I am deeply interested in how technology is changing the brokerage model and how smaller firms can differentiate against national platforms. I value unique insights that connect immediate market conditions to the broader picture."</i></p>	<p><i>"I am experienced."</i></p>

## PROFILE BEST PRACTICES

The difference between a profile that works and one that sits idle comes down to specificity. Here are the practices that separate effective profiles from decorative ones:

**Be specific about grammar and style.** AI tools will follow precise writing rules if you state them clearly. "Do not use exclamation points in client communications" works. "Write professionally" does not. If you have a preferred style guide (AP, Chicago, APA), name it.

**Set your expertise level.** Telling AI your background prevents it from over-explaining things you already know. A 20-year broker does not need AI to define "net effective rent" or explain what a letter of intent is.

**Include standing instructions for recurring tasks.** If you frequently ask AI to draft emails, property summaries, or market comparisons, specify your default tone and length once in your profile instead of repeating it every time. Example: "When I ask you to draft a client email, default to 150 words or fewer unless I specify otherwise."

**Tell it what NOT to do.** Negative constraints are powerful. "Do not use bullet points unless I request them." "Do not add disclaimers to every response." "Do not start responses with 'Great question.'" These boundaries shape the AI's behavior as much as positive instructions.

**Update your profile quarterly.** Your profile is not permanent. As you learn what AI gets wrong, add corrective instructions. As your role evolves, update your context. Think of it as a living document that grows sharper over time.

**Ask for clarifying questions on open-ended prompts.** Include an instruction like "Ask clarifying questions for open-ended prompts" so the AI does not guess when it should ask. This one instruction alone will dramatically improve the quality of responses for complex requests.

### The Power of Specificity

A profile instruction like "Focus on unique insights that go beyond the obvious, connecting immediate market conditions to the broader strategic picture" will produce noticeably different outputs than "Give me good insights." The AI calibrates its depth and creativity based on what you tell it you value.

## YOUR PROFILE TEMPLATE

Copy the template below, fill in the brackets with your own details, and paste it into your AI tool's profile settings. Remove any sections that do not apply, and add anything that is uniquely yours.

### WHO I AM

I am [Your Title] at [Your Company/Firm]. I specialize in [your niche: e.g., office leasing in the Philadelphia suburbs / multifamily asset management / mixed-use development / CRE investment sales]. I have [X] years of experience in commercial real estate. My clients are [describe your typical client: e.g., institutional owners, mid-size corporate tenants, private developers]. My market is [geographic focus]. I manage/lead [team size or scope, if applicable].

### HOW I COMMUNICATE

Write in [active/passive] voice. Use [full words/contractions]. Keep the tone [professional but warm / direct and concise / analytical and data-driven]. Do not use [em dashes, exclamation points, jargon, emojis, etc.]. When drafting communications on my behalf, match the tone of [describe: e.g., a trusted colleague, a polished executive letter, a client-facing marketing piece].

### WHAT I VALUE IN OUTPUTS

Prioritize accuracy. If you are not sure about a data point, say so rather than guessing. Use specific numbers and examples when possible. I prefer [concise summaries that lead with the conclusion / detailed analysis with supporting evidence / options with pros and cons]. When drafting client-facing content, match the quality standard I would expect from a senior colleague, not a first draft.

### MY CONSTRAINTS AND BOUNDARIES

Never fabricate statistics, market data, or case studies. Do not name my clients or include confidential lease terms, deal specifics, or proprietary financial information. [Add your industry-specific guardrails: e.g., "When referencing zoning codes or municipal regulations, verify the correct jurisdiction." "Do not cite specific cap rates or rental rates unless I provide them."] Do not add disclaimers to every response. Ask clarifying questions for open-ended prompts.

### WHAT MAKES MY CONTEXT UNIQUE

My professional strengths include [list 2-3: e.g., relationship building, creative deal structuring, market pattern recognition]. I am interested in [list 2-3 areas: e.g., how technology is changing brokerage, women's leadership in CRE, adaptive reuse of office buildings]. I prefer responses that [connect immediate issues to the broader strategic picture / offer multiple perspectives / prioritize actionability].

### STANDING INSTRUCTIONS FOR RECURRING TASKS

[Add task-specific defaults. Examples: "When I ask you to draft a client email, default to 150 words or fewer." "When I ask for a market comparison, lead with the key takeaway before supporting data." "When I ask you to write a property marketing narrative, use a compelling but factual tone and keep it under 200 words." "For complex queries with multiple considerations, present options with trade-offs rather than a single recommendation."]

## THE RISE+ FRAMEWORK

When you need AI to produce professional-quality output for a specific task, structure your prompt with RISE+. This is a repeatable method that transforms generic responses into work you can actually use.

<b>R: Role</b>	<p><b>Tell AI who it is.</b></p> <p><i>"You are a senior commercial real estate broker specializing in office leasing in the Philadelphia suburbs."</i></p>
<b>I: Instructions</b>	<p><b>Tell AI what to do.</b></p> <p><i>"Draft a follow-up email to a prospective tenant who toured our 25,000 SF Class A office property last week."</i></p>
<b>S: Specifics</b>	<p><b>Give context.</b></p> <p><i>"The tenant seemed interested but has gone quiet for 5 days. Their current lease expires in 8 months. Tone should be professional but not pushy. Keep it under 100 words."</i></p>
<b>E: Examples</b>	<p><b>Show what good looks like.</b></p> <p><i>Paste a previous email you liked, or describe the style: "Match the tone of my previous follow-ups: warm, specific to their visit, with one clear next step."</i></p>
<b>+ Iterate</b>	<p><b>Never accept the first output.</b></p> <p><i>Push back. "Make it shorter." "Remove the jargon." "This sounds generic. Make it sound like me." "Add a reference to the renovated lobby they commented on." The iteration is where the quality lives.</i></p>

## BEYOND THE BASICS: ADVANCED PROFILE STRATEGIES

### Layer Your Instructions by Task Type

Your profile can include conditional instructions that activate based on what you are asking. For example: "When I ask you to draft client communications, use a warm, relationship-forward tone. When I ask for market analysis, be direct and cite specific data. When I ask you to prepare talking points for a pitch, organize them by the client's priorities, not mine." This allows a single profile to serve multiple workflows without creating conflicts.

### Define Your "Do Not" List

Negative constraints are often more powerful than positive ones. Consider building a running list of things the AI does that annoy you, and encode them as explicit prohibitions:

- Do not start responses with "Great question" or "Absolutely."
- Do not use bullet points unless I specifically request them.
- Do not summarize what I just said back to me before answering.
- Do not add safety disclaimers unless the topic genuinely requires one.
- Do not use emojis.
- Do not refer to commercial real estate as "CRE" unless I do first.

### Create a Feedback Loop

When AI does something you do not like, do not just correct it in the moment. Go back and add a permanent instruction to your profile. Over time, your profile becomes a refined operating manual that eliminates recurring friction. The goal is to never correct the same mistake twice.

### Use Memory and Profile Together

Claude has a memory system that learns from your conversations over time. Your profile handles the permanent, structural instructions. Memory handles the evolving context. Together, they create a system where Claude knows both your rules and your recent history. Think of your profile as the constitution, and memory as the case law.

#### A Real-World Example of Profile Power

With a well-crafted profile, you can type something as simple as "Draft a message to my client about the lease renewal timeline" and get a response that already matches your voice, your preferred length, your tone, and your client relationship context. No preamble. No corrections. That is the goal.

## YOUR 30-DAY ACTION PLAN

**Week 1: Audit.** Look at your last five work tasks. Which ones could AI have handled? Which ones required your judgment? Write down the difference.

**Week 2: Taste Test.** Take your next deliverable (a proposal, a market report, a client email). Before you send it, ask: Would I accept this if a competitor sent it to my client? If the answer is "it is fine," rewrite it until the answer is "this is distinctly mine."

**Week 3: Mentor Forward.** Have one conversation with a colleague early in their career. Ask them how they learn their market. Listen. Then share how you learned yours. Notice the difference.

**Week 4: Set Up Your Profile.** Use the template in this guide. Customize it. Paste it in. Test it with a simple task. Refine it. This is an investment of 20 minutes that will save you hours every month.

## YOUR FIRST 30 MINUTES WITH AI

Here is a suggested sequence for your first session after setting up your profile:

1. **Set up your profile.** Copy the template, customize it with your details, and paste it into your AI tool's settings.
2. **Test with a simple task.** Ask it to draft a short client email in your voice. Evaluate whether it matches your tone and style expectations.
3. **Correct and refine.** If anything feels off, go back to your profile and add a specific instruction. Be precise about what you want changed.
4. **Try a complex task.** Ask it to help with a market analysis, a pitch strategy, or a communication you have been putting off. See how it handles nuance.
5. **Build your "Do Not" list.** After 5 to 10 conversations, you will have a clear sense of the AI's default behaviors that do not work for you. Add those to your profile.

Questions? Connect with me.

**Jigar B. Desai, PhD, PE, MBA**

[linkedin.com/in/drjigardesai](https://www.linkedin.com/in/drjigardesai)

*Ever Upward.*

## IMPORTANT DISCLAIMER

This guide is provided for informational and educational purposes only. AI tools, platforms, capabilities, and interfaces are evolving rapidly. Features, settings, and workflows described in this document may change without notice as providers update their products. The author makes no guarantees regarding the accuracy, completeness, or continued applicability of the information contained herein.

**Follow your organization's AI policy.** Before using any AI tool in a professional setting, consult and comply with your company's AI usage policy, data privacy requirements, and confidentiality obligations. Many organizations have specific guidelines governing what information may be shared with AI platforms, how outputs should be reviewed, and which tools are approved for use. If your organization does not yet have an AI policy, raise the conversation with your leadership before inputting sensitive, proprietary, or client-related information into any AI tool.

**Protect confidential and privileged information.** Do not input client names, proprietary data, trade secrets, personally identifiable information (PII), protected health information (PHI), financial records, or any information subject to non-disclosure agreements into AI tools unless your organization has explicitly approved such use and the platform's data handling practices meet your compliance requirements.

**Verify all AI-generated outputs.** AI tools can produce inaccurate, outdated, or fabricated information. Always review, fact-check, and validate AI-generated content before using it in any professional deliverable, communication, or decision. The human in the loop is not optional.

**Technology changes fast.** The AI landscape is evolving at an unprecedented pace. Features, pricing models, data retention policies, and platform capabilities referenced in this guide may have changed since the date of publication. Always confirm current functionality directly with the platform provider.

**Assumption of responsibility.** By using the information in this guide, you assume full responsibility for how you configure, use, and apply AI tools in your work. The author and any affiliated organizations accept no liability for any outcomes, errors, data exposure, or consequences arising from the use of AI tools or the implementation of the recommendations contained in this document.

*This guide reflects the author's individual perspective and experience. It does not constitute legal, technical, or professional advice. When in doubt, consult with your organization's legal, IT, or compliance team.*