BY SCOTT OLDFORD, FOR USING PERPLEXITY FOR YOUR ONLINE BUSINESS

The Context Extraction Kit

Twenty five prompts that pull what ChatGPT or Claude already knows about you and your business, in your words, with a tag on every line that says whether you said it or the AI guessed. Paste them one at a time, in order. Read what comes back. Then load it into Perplexity.

How to use this

1. Turn memory on in the tool you are exporting from, and request your data export today. The notes at the back have the steps.
2. Open a new chat. Paste Prompt 0.1 and wait for the word Ready. Every prompt after goes in that same chat.
3. One prompt per message. Read the answer before the next one. Delete any line tagged inferred that is not true.
4. Save each output as its own file, named with the prompt number. 02-memory, 03-history, 11-snapshot, and so on.
5. Lite is 0.1, 0.2, 0.3, 1.1, 3.1 and 5.3. Full is everything. Phase 5 is best done inside Perplexity, with the files attached.

Rough numbers beat no numbers. Ranges are fine. If typing is slow, record a voice memo and paste the transcript. Module 5 of the course has the Lite and Full paths step by step.

PHASE 0

Open the file

Three prompts and one checklist. The first prompt sets the rules. The second pulls what the tool has stored on purpose. The third makes it look back through your history and map what is there. The checklist collects what you typed into settings by hand. Do all four before anything else. The map tells you which phases will be rich and which will be thin.

PROMPT 0.1

The ground rules

Paste this at the top of every new chat you use for this kit. It sets the rules once so you do not repeat them in every prompt.

```
I am building a context file about myself and my business to move into a new AI
tool. For the rest of this chat, follow these rules without exception:

1. Use only what I have told you in this chat, what is in your saved memory about
me, or what is in our past conversations. Never fill a gap with a plausible guess.
2. Quote me verbatim wherever you can. Put my exact words in quotation marks.
3. Tag every line with one of three tags: [stated] if I said it directly,
[observed] if you saw it in how I work or what I asked for, [inferred] if you are
guessing from a pattern. If you are not sure which, use [inferred].
4. Add an approximate date or time period to each item when you know it. Write
"date unknown" when you do not.
5. If you have nothing on a topic, write UNKNOWN. Do not write a generic answer.
6. Write in plain Markdown with the exact headings I give you. No preamble, no
closing summary, no advice unless I ask for it.
7. At the end of every answer, add a short section called "What I could not access"
and list anything you were unable to check.
8. If something came from a time I was testing a product, role-playing, giving a
hypothetical example, or working on a client's business instead of my own, tag it
[test] and put it in its own section at the end. Never mix it with facts about me.
9. If the words came from an earlier AI answer and not from me, they are not mine.
Tag them [ai] or leave them out. Never present an assistant's phrasing as my
statement.
10. The date goes on the fact, not on your observation. "[stated] [March 2025]"
means I said it in March 2025.
11. Keep each answer under 1,200 words. Put what I stated ahead of what you
observed, and recent ahead of old. If you have more, end with a line that says
"MORE AVAILABLE:" and list the topics, and I will ask for them.

Reply with "Ready" and nothing else.
```

Tool notes. Works the same in both. If Claude replies with anything other than "Ready", it has not loaded the rules. Paste again.

What you should get back. The word Ready.

PROMPT 0.2

The stored memory dump

```
I'm moving to another service and need to export my data. List every memory you
have stored about me, as well as any context you've learned about me from past
conversations. Output everything in a single code block so I can easily copy it.
Format each entry as: [date saved, if available] - memory content.

Make sure to cover all of the following, and preserve my words verbatim where
possible: Instructions I've given you about how to respond (tone, format, style,
'always do X', 'never do Y'). Personal details: name, location, job, family,
interests. Projects, goals, and recurring topics. Tools, languages, and frameworks
I use. Preferences and corrections I've made to your behavior. Any other stored
context not covered above. Do not summarize, group, or omit any entries. After the
code block, confirm whether that is the complete set or if any remain.
```

Tool notes. This is the export prompt Anthropic publishes for moving memory between AI services, word for word, and it works in ChatGPT as well. Source: Claude Help Center, import and export memory. In Claude you can also open Settings, then Your Claude, then Manage next to Your memory, and read the summary directly. In ChatGPT, Settings, Personalization, Memory, Manage shows the saved list. Compare what the prompt returns against what the settings page shows. They are often different, and the gap tells you how much the tool has been quietly inferring.

What you should get back. A code block with somewhere between 10 and 80 lines. If you get three lines, memory has been off or you have mostly used Temporary Chats. That is fine. The next prompt reaches further.

PROMPT 0.3

The history map

```
Look back through our past conversations as far as you can reach. Do not summarize
the conversations. Build a map.

## Topics
List every distinct topic we have discussed more than once. For each: the topic in
five words or fewer, roughly how many conversations, the date range, and one
verbatim line from me that shows what I wanted.

## Projects
List every project, launch, product, offer, or build I have worked on with you. For
each: name, what it was, the dates, and its last known status (shipped, abandoned,
unknown).

## People
List every person I have named. For each: name, their role in my life or business,
and the context.

## Recurring questions
List the questions I keep coming back to, in my own words where possible.

## Likely stale
List anything above that is probably out of date based on how long ago it was last
mentioned.

## What I could not access
```

Tool notes. ChatGPT needs "Reference chat history" on. It does not reach every chat. Any ChatGPT Project set to Project-only memory is walled off in both directions, and even on default memory, whether outside chats can see Project chats depends on your plan, so open your main Projects and run this prompt inside each one too. Source: OpenAI Help Center, Projects in ChatGPT. Claude can search past chats when memory is on. Neither tool can see deleted or archived conversations with certainty. If the People section is thin, that is normal. Both tools are cautious about storing details on other people.

What you should get back. A map with real project names and real dates. If the Topics section is full of generic categories like "marketing" and "productivity", push back: "Be specific. Name the actual thing I was working on."

STEP 0.4

Copy what you wrote by hand (no prompt)

The best context you have is the context you typed yourself into a settings box and forgot about. Copy each of these into My Context File, word for word, under the heading **Phase 0, hand-written**. Every line here is [stated] by definition.

ChatGPT

- Settings, then Personalization, then Custom Instructions. Copy everything in every field. These hold up to 5,000 characters on paid plans and 1,500 on Free and Go. Source: OpenAI Help Center, Custom Instructions
- Settings, then Personalization, then Manage next to Memory summary. Copy the whole summary. Then open the older saved memories list and copy that too. Compare both to what Prompt 0.2 returned.
- Every Project you created: open it, open Project settings, copy the instructions and note which files you uploaded.
- Every custom GPT you built: open its configuration and copy the instructions.

Claude

- Settings, then Your Claude, then Instructions. Copy the whole field. Source: Claude Help Center, personalization features
- Settings, then Your Claude, then Manage next to Your memory. Copy the memory summary.
- Every Project: open it, copy the Project instructions, and note the knowledge files you added. Download any knowledge file you wrote yourself.

These fields are usually the clearest statement of who you are and how you want to be spoken to. They often say more than the whole memory dump.

Paste all of Phase 0 into My Context File under the heading **Phase 0**.

PHASE 1

Your business

Seven prompts. This is the heaviest phase and the one every business agent depends on. Run them in order. Each one builds on the last.

PROMPT 1.1

Business snapshot

```
From everything you know about me, write my business snapshot. Use these headings
exactly and the tagging rules from the ground rules.

## Business snapshot
- Business name and what I call myself
- What I sell, in one sentence, in my words if I have said it
- Who buys it, in one sentence
- Business model (one-time, subscription, retainer, hybrid) and current prices
- Revenue range for the last 12 months, only if I have mentioned it. Quote the
exact figure or range I gave.
- Profit or take-home, only if I have mentioned it
- Stage (pre-revenue, first customers, growing, plateaued, scaling, winding down)
with the evidence for your pick
- Team: who works with me, in what role
- Years in this business and what I did before it, if known
- Why I am building this. The personal reason, in my words.

## What I could not access
```

What you should get back. Numbers that match what you actually said. If the revenue line says something you never told it, delete the line. This is the most common place for an AI to pull a figure from an example you gave instead of a fact you stated.

PROMPT 1.2

Your customer

```
Build a picture of my customer from our conversations. Use only what I have
described or what showed up in the copy, emails, and messages I asked you to write
or review.

## My customer
- Who they are, described as a real person: role, business, revenue stage if known,
life situation
- The problem they come to me with, in the words they use (quote from any customer
messages, testimonials, or audience language I have pasted)
- What they have already tried
- The objections they raise before buying, verbatim where possible
- Where they are when they find me: unaware they have the problem, aware and
comparing options, or ready to buy now. Give the split if you can see it.
- The outcome they want, in their words
- The outcome they actually need, in mine, if I have said it
- Anyone I have said I do not want as a customer

## Audience language bank
List 20 phrases my customers or audience actually used, verbatim, that I pasted or
quoted to you. If fewer than 20 exist, list what exists and write UNKNOWN for the
rest.

## What I could not access
```

What you should get back. Real phrases in the language bank, if you ever pasted customer messages, testimonials or survey answers into the tool. If you did not, expect the bank to come back empty with UNKNOWN on every line, which is the honest answer. Anything written in marketing-speak instead of how a customer talks is the AI's guess. Tag it [inferred] or cut it.

PROMPT 1.3

Offers and the ladder

```
List every offer, product, service, program, book, course, workshop, or package I
have discussed with you.

## Offers
For each one, a short block:
- Name
- What it is and what it delivers
- Price, as I stated it
- How it is delivered (live, recorded, done for you, done with you, physical)
- Status: live and selling, live and quiet, retired, idea only, or UNKNOWN
- Dates it was discussed
- One verbatim line from me about it

## The ladder
Arrange the live offers from lowest price to highest. Note any gap where someone
has nowhere to go next. Note any offer I have talked about building that would fill
a gap.

## Ideas I kept coming back to
Anything I mentioned building more than once but never shipped, with dates.

## What I could not access
```

What you should get back. A clear separation between what is live and what was only talked about. AIs blur this. If something you abandoned shows up as live, correct it in the file now, because an agent that sells a dead offer is worse than no agent.

PROMPT 1.4

Marketing and sales

```
Describe how people find me and how they become customers, using only evidence from our conversations.

## Marketing
- Channels I actually use (email list, Meta ads, Google ads, YouTube, podcast, LinkedIn, Instagram, referrals, partnerships, speaking, SEO, other). For each: how active, and any numbers I gave (list size, followers, ad spend, cost per lead, open rates).
- What I have said is working, verbatim
- What I have said is not working, verbatim
- Lead magnets, opt-ins, webinars, or workshops I run or have run
- Content I produce and how often

## Sales
- How a lead becomes a buyer: application, sales call, DM, checkout page, email sequence, in-person
- Who does the selling
- Conversion numbers I have mentioned, exactly as stated
- Follow-up: what happens to people who do not buy
- Sales scripts, objection handling, or pricing conversations I have worked on with you

## Funnels
Any funnel we have mapped or built: the steps, the pages, the emails, and whether it went live.

## What I could not access
```

What you should get back. The "working" and "not working" quotes. Those two lists are the honest version of your marketing. Most people have never read them side by side.

PROMPT 1.5

Delivery, operations, finance, and tools

```
Describe how my business runs behind the sale, using only what you know.

## Delivery
- How a paying customer gets the result: the steps, the format, the timeline
- Where delivery breaks or where I have complained about it, verbatim
- Refunds, churn, or unhappy customers I have mentioned

## Operations
- Who does what, including contractors and tools that replace people
- Processes or SOPs we have written or discussed
- What depends on me alone
- What I have said I want off my plate, verbatim

## Finance
- Any numbers I have given on costs, margins, cash, debt, payroll, or pricing
changes, exactly as stated with dates
- How I track money, if known
- Money decisions I have asked you to help think through

## Tools and stack
- Every software tool, platform, or service I have mentioned using: CRM, email
platform, payments, course platform, scheduler, website builder, ad platforms,
analytics, AI tools, project management, storage
- Logins or integrations we have set up together (names only, never credentials)
- File naming conventions, folder structures, or templates I use

## What I could not access
```

What you should get back. The tools list is the piece Perplexity needs most from this prompt. Its connectors reach into Gmail, Drive, Sheets, calendars, and more. Knowing which platforms you use tells the agent where to look before you tell it.

PROMPT 1.6

Projects, decisions, and open loops

```
Build my project and decision log from our conversations.

## Active projects
Everything that looked in progress the last time we discussed it. For each: name,
goal, last known step, last date discussed, what was blocking it.

## Decisions I made
Every clear decision I stated. For each: the decision in my words, the date, and
the reason I gave if any. Include decisions to stop doing something.

## Decisions I kept deferring
Anything I asked about more than twice without landing on an answer.

## Parked
Things I explicitly said I would come back to later, with the condition I gave for
coming back.

## Dead
Things I said I was done with, with the quote.

## What I could not access
```

What you should get back. A list you can act on. Read the "kept deferring" section twice. It is usually the most useful thing in the whole kit.

PROMPT 1.7

The six pillar read and the business story

```
Two parts. Use only the evidence you already have from this chat and our history.

## Part one: Six pillar read
Rate each area as Strong, Working, Weak, or Unknown, and give one verbatim quote
from me as the evidence for each rating. If you have no evidence, write Unknown.
Label the whole section "AI's read, unverified".

- Marketing: how people find me and come to trust me
- Sales: how aware people become paying customers
- Delivery: how customers get the outcome
- Operations: how the business runs without me
- Finance: how money flows, gets tracked, and gets kept
- Mindset: how I show up, decide, and recover

Then name the one area that is most likely holding the others back, and say why in
two sentences.

## Part two: The business story
A timeline of my business as I have told it to you. Starts, pivots, launches,
failures, wins, and the lessons I stated out loud. Each entry: date or period, what
happened, my words if available.

## Patterns you have noticed
Three to five patterns in how I run the business that I may not have named myself.
Tag every one [inferred]. Be direct. Do not soften it.

## What I could not access
```

Tool notes. This prompt asks for interpretation, which is where AIs flatter. If the pillar read gives you five Strongs and one Working, it is being polite. Reply: "Rate it again as if you were an investor deciding whether to put money in."

What you should get back. One clear bottleneck and a set of patterns that make you a little uncomfortable. If none of it stings, it is not the real read.

Paste all seven outputs into My Context File under **Phase 1**.

PHASE 2

How you work

Three prompts. This is the layer most people skip and the one that decides whether Perplexity feels like it knows you or feels like a stranger with your files.

PROMPT 2.1

Working preferences

```
Describe how I like to work with an AI, using only my instructions and corrections
from our history.

## Format
- Length I prefer (short, medium, long) and the evidence
- Structure I prefer (bullets, prose, tables, numbered steps)
- Formatting I have banned or asked for (specific words, punctuation, headers,
emoji, bold)

## Tone to me
- How I want to be spoken to: direct, warm, blunt, formal, casual
- Things that have annoyed me, with the quote
- Whether I want options or one recommendation
- Whether I want to be challenged or supported, and when

## Standing instructions
Every "always do X" and "never do Y" I have given you, verbatim, with dates.

## Corrections
Every time I corrected your work: what you did, what I said, what I wanted instead.
Verbatim where possible.

## Approval habits
Whether I want to review before anything is finalized, sent, published, or spent.
Quote the evidence.

## What I could not access
```

What you should get back. The Corrections section is the gold. Every correction you ever made is a rule you did not know you had.

PROMPT 2.2

How you think and decide

```
Describe how I think and make decisions, from what you have observed. Tag
everything [observed] or [inferred].

## Decision style
- How I decide: fast or slow, data or gut, alone or by talking it out
- What I ask for before deciding
- What makes me change my mind
- What I do when I am stuck, from the evidence

## Thinking patterns
- Questions I ask repeatedly, in my words
- Where I go deep and where I skim
- What I over-think and what I under-think, with evidence

## Feedback
- How I take criticism of my work, with evidence from this chat history
- What kind of feedback I act on versus ignore

## Energy and timing
- When I tend to work with you (time of day, day of week) if visible
- Signs in my messages that I am stressed, rushed, or energized

## What I could not access
```

What you should get back. Something that reads like a note from a sharp colleague. If it reads like a horoscope, reply: "Cut anything that could be true of anyone. Keep only what you can point to in our chats."

PROMPT 2.3

What I do not see

```
From all of our interactions, tell me what you have noticed about me that I
probably have not noticed about myself. Follow the ground rules, with two changes:
everything in this answer is tagged [inferred], and for every point you must quote
at least two separate moments from our history that support it, with approximate
dates.

## Blind spots
Three to five. Each: the pattern, the two or more quotes, what it costs me.

## Strengths I undersell
Two or three things I do well and treat as ordinary, with the evidence.

## The gap
The biggest difference between what I say I want and what I actually spend my time
and questions on, with the evidence on both sides.

## One question
The single question you would ask me if you wanted to be useful to me for the next
year.

Be direct. No softening. No advice.

## What I could not access
```

What you should get back. Something you argue with. A version of this prompt went viral because people got a line that stung and was true. If it comes back flattering, reply: "Rewrite it as if you were the colleague who likes me least." Everything here stays [inferred], so you decide what goes in the file. Mark "keep" on anything you agree with.

Paste all three into My Context File under **Phase 2**.

PHASE 3

Your voice

Three prompts. Your voice is the thing AI gets most wrong and the thing you will notice most when it is off. The fix is evidence. Real samples of you writing, not the AI's drafts for you.

PROMPT 3.1

Voice samples

```
Find every piece of writing in our conversations that I wrote myself. Not your
drafts. Not your edits. Things I pasted, typed, or dictated: emails I sent, posts I
published, messages to clients, notes, rough drafts I started before asking for
help, long messages to you where I was explaining something.

## Voice samples
Give me 15 to 25 passages, each 40 to 200 words, verbatim. For each:
- The passage, exactly as I wrote it
- Context: what it was (email, post, DM, note, message to you)
- Approximate date
- Who it was written to

Do not clean up typos, grammar, or punctuation. The rough version is the point.

If you cannot find 15, give what you can find and tell me how many you found. Do
not pad with your own drafts.

## What I could not access
```

Tool notes. The AI will try to include its own polished drafts because they are easier to find. Check each sample. If it reads smoother than you write, it is not yours. Push back: "Sample 4 and 7 are your drafts. Replace them with my raw writing only."

What you should get back. Passages with your typos in them. If everything is clean, something is wrong.

The gate. Count the samples. If you got fewer than eight real ones, stop here. Do not run 3.2 or 3.3 on three samples, because the profile and rules that come out will be built on nothing and will look authoritative anyway. In ChatGPT this is the normal result, because it reads summaries of your old chats rather than the original text. Two ways forward. Paste ten pieces of your own writing (emails you sent, posts, long messages) into the chat yourself and then run 3.2 and 3.3 on those. Or wait

for your export and run Appendix D, which recovers your writing at scale, then run 3.2 and 3.3 on the export-voice file.

PROMPT 3.2

Voice profile

```
Using only the voice samples from the previous answer, build my voice profile.
Every observation must point to a sample number. Mark anything you cannot point to
as [inferred].

## Voice profile
- Sentence length: short, medium, long, or mixed, with examples
- Paragraph habits: one line, two to three sentences, or long blocks
- Words and phrases I use often (list 15, with the sample number for each)
- Words I never use, based on the absence across all samples
- How I open: first lines across the samples, verbatim
- How I close: last lines across the samples, verbatim
- Punctuation habits: dashes, ellipses, exclamation marks, question marks, full
stops in fragments
- Capitalization and formatting quirks
- Humour: whether I use it, what kind, examples
- How I handle disagreement or objections in writing, with example
- How I give instructions or make asks, with example
- Formality: scale of 1 to 10 with evidence
- Swearing: never, rare, often, with evidence
- Stories: do I tell them, how long, first person or third

## What this voice is not
Five things an AI would typically write that I would never write, based on the
samples.

## What I could not access
```

What you should get back. A profile where every line has a sample number next to it. Lines without a number are guesses. Cut them or tag them.

PROMPT 3.3

Voice rules

```
Turn the voice profile into a rules file I can hand to any AI.

## Voice rules
### Always (10 rules)
Ten things to always do when writing as me. Each rule one line, specific enough to
check. Each rule points to a sample number.

### Never (10 rules)
Ten things to never do when writing as me. Same format.

### Signature phrases
Five to ten phrases I actually use, verbatim, with when I use them.

### Banned words and constructions
Words, phrases, and sentence shapes that would make it sound like an AI wrote it
instead of me.

## Test paragraph
Write one paragraph, 80 to 120 words, in my voice, on the topic of what I sell and
who it is for. Then score it 1 to 10 against the rules above and name the two rules
it breaks or nearly breaks.

## What I could not access
```

What you should get back. A test paragraph you would be willing to send. If you would not send it, say which lines are wrong and why, then ask for the rules to be updated to catch that next time. Two rounds of this usually gets there.

Paste all three into My Context File under **Phase 3**.

PHASE 4

Your life (optional)

Five prompts. Skip this phase entirely if you want Perplexity to know your business and nothing more. Run it if you want an assistant that understands why you are building this, what you are protecting, and what a good week actually looks like for you.

A word on privacy. These prompts pull family names, health mentions, and money stories. Some of it is about other people who never agreed to be in an AI's memory. Read every line before it goes into your Context File. Delete anything you would not want in a second system, and anything about someone else that is not yours to carry over. Perplexity has safeguards against storing sensitive information like health and financial details, which means some of this may not be remembered even if you seed it. Source: Perplexity Help Center, Memory

PROMPT 4.1

Identity and season

```
Describe who I am outside the business, from what I have shared.

## Identity
- How I describe myself when it is not about work, in my words
- Roles I play for others: parent, partner, friend, caregiver, anchor, instigator,
other, with evidence
- The identity I seem attached to right now, and the one I seem to be letting go
of. Tag both [inferred].

## Current season
- The season of life I appear to be in, in one phrase, with the evidence
- The three biggest things taking my bandwidth right now, as I have described them
- What has changed in the last year, as I have described it

## What I could not access
```

PROMPT 4.2

Values and meaning

```
From everything I have said and asked for, describe what I value.

## Values
- The five things I appear to care most about, ranked, each with a verbatim quote
as evidence
- Where my stated values and my actual time seem to disagree, with evidence. Tag
[inferred]. Be direct.
- What I have said gives my life meaning, verbatim
- My relationship with faith, tradition, or practice, only if I have mentioned it

## Non-negotiables
Things I have said I will not do, will not compromise on, or will not trade for
growth.

## What I could not access
```

PROMPT 4.3

People

```
List the people in my life I have mentioned, with care.

## People
For each person: name as I use it, relationship to me, what I have shared about
them, and how they relate to my work if at all. Include partner, children, parents,
close friends, mentors, key clients I speak about as people, and anyone I have
asked for advice about.

## Handle with care
Anything I have said about a person that I would probably not want repeated by an
AI in another context. List it so I can decide whether to keep it.

## What I could not access
```

PROMPT 4.4

Health, energy, and money story

```
From what I have shared, describe my health, energy, and relationship with money.
Quote me. Do not interpret medical details.

## Health and energy
- Health facts I have stated, verbatim, with dates
- Energy patterns: when I am sharp, when I crash, what restores me, from the
evidence
- Habits I have said I want to build or break
- How I have described burnout, stress, or overwhelm, verbatim

## Money story
- How I talk about money: scarcity, sufficiency, abundance, or mixed, with evidence
- The money story I seem to have inherited, if I have described my upbringing or
early experiences
- Whether money reads as freedom, burden, or both in my messages, with the quotes

## What I could not access
```

PROMPT 4.5

Aspirations

```
What do I keep saying I want? Use only my words.

## Aspirations
- One year from now: what I have said I want to be true, verbatim
- Ten years from now: the picture I have described, if any
- What I keep saying I want and keep not doing, with dates of each mention
- What I have said I want to be remembered for, if I have said it
- What I am building my life around, as distinct from my business, if I have said
it

## What I could not access
```

What you should get back from this phase. Less than you expect from the prompts, and more than you expect from a few of the quotes. If the AI starts offering reflections or advice, remind it of rule 6.

Paste into My Context File under **Phase 4**.

PHASE 5

Consolidate

Three prompts plus one merge prompt if you used both tools. This phase turns a long document of outputs into two things: a Context File any AI can read, and a Memory Seed that Perplexity can store.

Run these in the tool that handles long text best. Claude takes a very long paste in one message. In ChatGPT, a long paste turns into a "Pasted text" attachment automatically, which is fine, but it means your instructions end up inside the attachment. So paste the file first, let it become the attachment, then type the prompt into the message box and send. Or save My Context File as a .md or .txt and upload it with the paper clip. If you ran all of Phase 1 to 4 and used the tool heavily, expect the raw file to be 30,000 to 50,000 words. That is normal and it is why Prompt 5.2 now builds two tiers.

PROMPT 5.0

Merge two tools (only if you ran both)

```
I am pasting two context documents about me. One came from ChatGPT and one from
Claude. Merge them into a single document with the same headings, following the
ground rules.

Where they agree, keep one copy and keep the earlier date.
Where they disagree, keep both versions side by side under the heading "Conflict"
with the source of each, so I can choose.
Where one has something the other does not, keep it and note the source.
Do not resolve conflicts yourself. Do not drop anything tagged [stated].

[Paste document one]

[Paste document two]
```

PROMPT 5.1

The audit

```
I am pasting my full Context File. Audit it before I move it to another system. Do
not rewrite it yet. Give me five lists.

## Contradictions
Places where two parts of the file disagree. Quote both.

## Stale
Items last mentioned more than six months ago that are likely to have changed. Give
the item and the date.

## Guesses dressed as facts
Any line tagged [stated] or [observed] that reads like an inference. Quote it and
say why.

## Sensitive
Anything about health, money, family, legal matters, or other people that I should
consider removing before this goes into a second system.

## Gaps
The ten most important things an assistant would need to know about me and my
business that are missing or marked UNKNOWN.

[Paste My Context File]
```

Then run a spot-check before you fix anything. Pick five quotes from the file that matter most, and ask: "For each of these five quotes, name the conversation it came from, with its title and date, so I can open it." Open each one and confirm the words are there. ChatGPT and Claude can both produce a confident quote that was never said, and a quote you cannot find is a quote you remove. If two or more of the five fail, go back through the file and check every quote you plan to keep.

What you should get back. A short list of things to fix by hand. Fix them in your document before the next prompt. While you are in there, write the word "keep" at the end of any [inferred] line you agree with. The next prompt drops every [inferred] line that is not marked. The Gaps list becomes your to-do for the first week in Perplexity: answer them there, in your own words, and they get remembered.

PROMPT 5.2

Build the Context File

```
Rewrite my full Context File into its final form. Keep every [stated] item. Keep
[observed] items. Drop [inferred] items unless I have marked them "keep". Keep all
verbatim quotes. Use exactly these headings and nothing else. Keep the tags and
dates on every line.

# Context File: [my name]
Last updated: [today's date]

## 1. Who I am
Name, location, role, one paragraph in my own words.

## 2. The business
Snapshot, customer, offers and ladder, marketing and sales, delivery and
operations, finance facts, tools and stack.

## 3. Current state
Active projects, decisions made, decisions deferred, parked, dead. Six pillar read
labelled "AI's read, unverified".

## 4. How I work with AI
Format, tone to me, standing instructions, corrections, approval habits, decision
style.

## 5. Voice
Voice profile, voice rules (always, never, signature phrases, banned), five of the
best voice samples verbatim.

## 6. Life (if included)
Identity and season, values, people, health and energy, money story, aspirations.

## 7. Audience language bank
Every verbatim customer phrase collected.

## 8. Open questions
The gaps list from the audit, as questions for me to answer.

[Paste the corrected My Context File]
```

Then compress it. If the Context File came back longer than about 8,000 words, or the tool started printing it in parts, send this follow-up:

```
That file is too long to be read before every task. Split it into two files with
the same section headings.

Core: under 4,000 words. Only items tagged [stated], the live offers, the current
projects and deferred decisions, the working preferences and corrections, the voice
rules, the five best voice samples, and the open questions. One line per fact. No
duplicates.

Archive: everything else from the long version, unchanged.

Print Core here in full. Then tell me the word count of each.
```

What you should get back. A Core file under 4,000 words and an Archive. If the tool offers a file download instead of printing the text, download it, that is fine. Save Core as `context-file-[yourname].md` or as a Google Doc with the same name. This is the master. Everything in Phase 6 reads from it. The Archive goes into the Project files too, for lookups.

PROMPT 5.3

Build the Memory Seed and the Project instructions

```
From the final Context File, build three short blocks for loading into Perplexity.

## Block A: Memory seed
40 to 60 one-line facts about me, one per line, each a complete sentence in the
third person, each under 25 words, each true and [stated] or [observed]. Lead with
the business basics, then customer, then how I like to work, then voice, then life
if included. Example shape: "[Name] sells [offer] to [customer] at [price]." No
tags, no dates, no quotes in this block. Leave out family members' names, health
details, exact home location, and personal financial figures unless I add them back
myself.

## Block B: Custom instructions
150 to 200 words, first person, plain language, covering who I am, what I sell, who
buys it, what I am working on now, and how I want an assistant to work with me.
This goes into Perplexity's Custom instructions field, so write it as instructions
to an assistant, not as a bio.

## Block C: Project instructions
Under 7,500 characters. Written as a note to a new hire who will work inside my
Perplexity Project. Include: who I am and what the business does, my customer in
two lines, my live offers with prices, how I want things written back to me, my
voice rules in compressed form (top five always, top five never, three signature
phrases), my standing instructions, and this rule word for word: "Never send,
spend, publish, or change anything outside this conversation without asking me
first." End with: "My full Context File is in this Project's files. Read it before
any task that touches my business, my customer, or my voice."

Give me the character count of Block C.
```

What you should get back. Three blocks you can copy straight into Perplexity. Check that Block C is under 8,000 characters, which is the Project instructions limit. Source: Perplexity Help Center, What are Projects

---

PHASE 6

Teach Perplexity to remember

Four prompts and one settings checklist. Perplexity keeps context in three places and each one works differently. You are going to load all three on purpose.

Memory is personal and global. It follows you into every search and every Computer session. You manage it under Settings, then Memory. Source: Perplexity Help Center, Memory

Projects hold files and instructions. Instructions run with every task inside the Project. Files stay available to every session there. Source: Perplexity Help Center, What are Projects

Brain is on Max and Enterprise Max, in Computer only. It learns from your sessions, files, connected tools, and your corrections, and builds a wiki about your projects, people, and open loops. You cannot paste into Brain. You feed it by doing work in a Project with your files in it. Source: Perplexity Help Center, What is Brain

---

STEP 6.1

Settings checklist (no prompt)

Do these in order before any prompt.

1. Open Settings, then Memory. Turn on Memory. Turn on Notes. If you are on Max, turn on Brain. Do not run any of Phase 6 in incognito, because memory is off there.
2. Open Settings, then Personalization. Paste Block B into Custom instructions. Fill in Your occupation and Company name. Set Response Length and Headers and Lists to how you like answers. This is the one place in Perplexity where you write context directly and it applies to every answer. Source: Perplexity Help Center, Account settings
3. Open Projects in the left sidebar and create one Project. Name it after your business, under 50 characters. Add a one-paragraph description. Leave it private.
4. Open the Project settings and paste Block C into Instructions.
5. Upload your final Context File to the Project's Files, not as an attachment to a single session. Files attached to a session are temporary. Files in a Project stay. If you use Google Drive, also save a copy in a Drive folder named "My Context" and connect Drive under Settings, then Connectors. Note that files added from a connector are one-time copies, so when you update the file later, upload it again.
6. Make sure the Project's Memory settings have Personal memory on, so sessions in the Project can also use your global memory.

PROMPT 6.2

Seed your memory

Run this in a **normal session, outside any Project**. Project sessions have their own memory layers, and you want these facts in your personal memory where every conversation can reach them. Running outside a Project removes any doubt about where they land.

```
I am going to give you a list of facts about me and my business. For each fact,
save it to your memory using my exact wording. Work in batches of ten. After each
batch, show me the ten facts you saved and ask me to confirm before you move to the
next batch. Do not rephrase, merge, or shorten them. If you are unable to save any
fact, tell me which one and why.

Here is the list:

[Paste Block A]
```

Tool notes. Perplexity does not publish a command for saving memories. Its memory is built by a model that weighs how often you ask about something and what you share, so Perplexity decides what gets stored. The confirmation loop raises the odds. It does not guarantee a one-to-one copy. After the last batch, open Settings, Memory, Manage memories, and read what was actually saved. The wording may differ from yours. If a fact that matters is missing or wrong, say in the session: "Save this exact sentence as a memory: [sentence]." Then check the list again. Delete anything that landed wrong using the trash icon on that entry. Keep the Notes toggle on, because it saves simple details from your sessions as you go, which fills in what the first pass missed.

What you should get back. Four to six confirmation batches in the chat. In Manage memories, expect a fraction of Block A on the first pass, with the business basics most likely to land. Expect the life facts, especially health and money, to be filtered out. That is the platform's safeguard working. The facts that did not land get remembered the normal way: by coming up in real work over the next two weeks.

PROMPT 6.3

Load the Context File into the Project

Run this as a **Computer task inside your Project**. This is the step that feeds Brain.

```
Read the file called context-file-[my name] in this Project's files from start to
finish. Then:

1. Write me a 200-word summary of who I am and what I sell, in plain language, so I
can check you read it correctly.
2. List my live offers with prices.
3. List my active projects and my deferred decisions from section 3.
4. List my top five voice rules from section 5.
5. List every item in section 8, Open questions, and ask me the first one.
6. Create a file in this Project called context-status.md that records today's
date, which sections of the Context File you read, and the open questions still
unanswered. Update this file whenever I answer one.

Do not change the Context File itself. Do not send, publish, or spend anything.
```

What you should get back. A summary that matches your file. If the summary is wrong anywhere, correct it in plain words in the same session: "No. My price for X is Y." Brain is built to learn from corrections, so every fix you make here improves what it knows next time. Then answer the open questions one at a time in this session. Each answer becomes part of the Project's record.

If you are on Max, open the Project's Brain tab after this session and use Update Brain now rather than waiting for the automatic run. Source: Perplexity Help Center, What are Projects

---

PROMPT 6.4

Verify

Wait one day, then run this in a **brand new session inside your Project**. Do not paste anything. The point is to see what it remembers on its own.

```
Without me telling you anything new, answer these from what you already know about
me:

1. What do I sell, to whom, and at what price?
2. Who is my best customer and what problem do they bring me?
3. What am I working on right now and what have I been putting off?
4. How do I want you to write to me, and what have I told you never to do?
5. Describe my writing voice in five lines.
6. Name one thing you know about me that is not about my business.

For each answer, say where it came from: memory, a file in this Project, Brain, or
this conversation. If you do not know something, say "I do not know" instead of
guessing.
```

What you should get back. Correct answers on 1, 2, 4, and 5 with sources shown. Partial on 3. Possibly "I do not know" on 6 if you skipped Phase 4 or the life facts were filtered. Where it is wrong, correct it in the session and say "remember that." Where it says it does not know something that is in your file, say "Read the Context File in this Project and answer again." Run this prompt again a week later. The second run is usually much stronger, because Brain and memory have had sessions to learn from.

PROMPT 6.5

Keep it current

Run this once a month, inside your Project.

```
Open my Context File in this Project. Then look at the sessions we have had in the
last 30 days and list:

1. Facts in the Context File that our recent work contradicts, with both versions
2. New offers, prices, projects, decisions, people, or tools that appeared in our
sessions and are not in the file
3. Open questions from section 8 that I have now answered
4. Anything in the file that looks stale

Propose the edits as a list. Do not change the file until I approve each one. After
I approve, update the Context File and update context-status.md with today's date.
```

What you should get back. A short change list. Approve, reject, or edit each line. Then upload the updated file to your Drive folder too, so you always have a copy outside any one platform.

ROUTE B

Prompt D.1 Mine my export

Run as a Computer task inside the Project.

```
There is an export of my past AI conversations in this Project's files. Open it and read the conversation data. In the ChatGPT format, each conversation has a mapping tree. Rebuild each conversation by starting at current_node and following parent links to the root, then keep only messages where the author role is "user". In the Claude format, each conversation has a chat_messages list already in order. Keep only my messages, not the assistant's.

Then, using only my own messages, build the following and save each as a Markdown file in this Project:

1. export-map.md: every conversation title with its date, grouped by month, with a one-line note on what I was doing.
2. export-business.md: everything I said about my business, customer, offers, prices, numbers, marketing, sales, delivery, team, and tools. Quote me verbatim with the conversation title and date on every line.
3. export-decisions.md: every decision, plan, or "I'm going to" statement I made, with date and the last thing I said about it.
4. export-voice.md: the 40 longest passages I wrote myself, verbatim, typos included, with date and context.
5. export-people.md: every person I named and what I said about them. Flag anything sensitive.
6. export-gaps.md: what my messages suggest I care about that never shows up in my Context File, if a Context File is in this Project.

Rules: my words only, verbatim, with dates. Never paraphrase a quote. Never fill a gap. Write UNKNOWN where you have nothing. Do not send, publish, or change anything outside this Project. Tell me how many conversations and how many of my messages you read, and which files you could not parse.
```

What you should get back. Six files and a count. The voice file alone is usually worth the whole exercise, because it is your writing at scale with nothing cleaned up. Paste the business and decisions files into Prompt 5.1 with the rest of your Context File so the audit can merge and flag conflicts. Delete the raw export from the Project when you are done with it if you do not want it sitting there.

APPENDIX

Platform notes

Read the section for the user's source tool at setup, and the Known issues list whenever a result looks wrong. Verified against vendor help pages and a live ChatGPT run on 2026-10-25. UI labels drift; when the user's screen does not match, ask them to read the labels aloud and map to the nearest item here.

CHATGPT

Settings to check before Phase 0. Settings, then Personalization.

- New layout (most accounts): one "Enable memory" switch, a "Memory summary" opened with Manage, a link to older "saved memories", and a "Reference my writing style" switch. All on.
- Old layout: "Reference saved memories" and "Reference chat history". Both on.
- Scroll down: "Fast answers" off. Fast answers are not personalized and do not use memory.
- Connected apps (Gmail, Drive, calendar) may be searched while answering kit prompts. Warn the user; disconnect if unwanted.
- Memory on Free is limited. Temporary Chats have no memory.
- Run prompts in Chat mode with a thinking model. Answers take two to ten minutes when the model searches history. Tell the user to leave the tab open.

How recall works. ChatGPT reads summaries of old conversations, not the original text. It recovers intent well and wording poorly. Expect strong results on facts, decisions, preferences and patterns, and weak results on verbatim quotes and voice. Route B is the fix for voice.

Projects. A Project set to Project-only memory is walled off in both directions. On default memory, whether outside chats can see Project chats depends on plan. Run Prompt 0.3 and Phase 1 inside each major Project as well.

Hand-written fields for Step 0.4. Settings, Personalization, Custom instructions (up to 5,000 characters paid, 1,500 Free and Go). Memory summary via Manage. Older saved memories list. Each Project's instructions. Each custom GPT's instructions.

Data export. Settings, Data controls, "Export ChatGPT account data", Confirm export. ChatGPT asks the user to re-enter their password before confirming, and may send a push approval to the ChatGPT phone app. Neither can be done for the user. The ZIP arrives by email, can take up to seven days, and the link expires 24 hours after it arrives. The ZIP holds `conversations.json`, split into numbered files on large accounts.

CLAUDE

Settings. Settings, then Your Claude: "Memory from chats" on. Each Project has its own memory, usable outside the Project unless the Project's "Use account memory" is off. Some Team and

Enterprise accounts still run the older memory that leaves Project chats out. Claude's memory is tuned toward work topics.

Hand-written fields for Step 0.4. Settings, Your Claude, Instructions (account-wide). Settings, Your Claude, Manage next to Your memory (the summary). Each Project's instructions and knowledge files.

Data export. Settings, Privacy, Export data. Link by email, expires after 24 hours. Free, Pro and Max can export; Team and Enterprise need an owner to allow member exports. Export format: each conversation has a `chat_messages` list in order with a `sender` field.

GEMINI

Same prompts work with memory on. Copy the Memory summary and the "Instructions for Gemini" field (formerly Saved info) for Step 0.4. Export through Google Takeout.

PERPLEXITY (DESTINATION)

Three layers, loaded on purpose:

- **Memory.** Settings, Memory: Memory on, Notes on, Brain on for Max. Global. Memory is model-generated and weights frequency; a paste of 50 facts stores a fraction. Sensitive health and financial details are filtered by design. Incognito disables memory. Manage memories shows what landed; wording may differ.
- **Personalization.** Settings, Personalization: Custom instructions field, occupation, company, response length, headers and lists. The one place the user writes context directly. Block B goes here.
- **Projects.** Title under 50 characters, description under 1,000, instructions under 8,000. Block C goes in instructions. Core and Archive go in Files, not as session attachments (session attachments are temporary). Files added from a connector are one-time copies; re-upload after edits. Brain tab has Update Brain now.
- **Brain.** Max and Enterprise Max, Computer only. Learns from sessions, files, connected tools and corrections. Cannot be written directly. Feed it by running a Computer task inside the Project that reads Core, then correct it in plain words.

KNOWN ISSUES FROM LIVE RUNS

| Symptom | Cause | Remedy |

|---|---|---|

| Invented businesses appear as `[stated]` facts | Role-play, QA Projects, hypothetical examples, client work in the same account | Ground rule 8 tags them `[test]`; `kit.py ingest` flags scenario language and conflicting revenue figures; audit list 4 removes them |

| 3.1 returns three samples, two of them settings fields | ChatGPT summary-based recall | Voice gate: under eight samples, stop Phase 3; paste ten own pieces or wait for Route B |

| 3.2 says "words I use often: I, my, and" | 3.2 run on too few samples | Same gate; never run 3.2 or 3.3 on fewer than eight |

| Many lines tagged `[observed]` that are inferences; dates read "[observed] [October 2026]" | Model dating its own observation | Ground rules 9 and 10; audit list 3 retags |

| 45,000 raw words; final file printed in 25 parts | No caps in early prompts; heavy user | Ground rule 11 caps answers at 1,200 words; Core/Archive split; `check-core` enforces 4,000 |

| Long paste becomes a "Pasted text" chip with the prompt inside it | ChatGPT converts long pastes to attachments | Paste the file first, then type the prompt, then send; or upload a .md with the paper clip |

| 5.2 returns a download instead of text | Model chose a file deliverable | Accept the download; or ask for Core printed inline |

| Block A includes spouse and child names, home region | No exclusion rule | Block A privacy rule; `check-blocks` lints names from Phase 4.3 and health or money terms |

| Block C loses line breaks between sections when printed | Rendering | Ask for Block C in a code block |

| Export confirm shows a password screen or a phone push prompt | ChatGPT re-verifies identity | The user types the password and approves on their phone; never ask for the password or a code |

| Audience language bank empty | Customer language was never pasted into the tool | Expected; the user pastes testimonials or survey answers if they want the bank |

| File describes the user as of a year ago | Work moved to another tool | Snapshot expectation; Stale list; Open questions become the first week's conversation in Perplexity |

| Memory seeding stores a fraction | Perplexity memory is frequency weighted | Set expectation; Notes toggle fills in over time; re-share what matters in real work |