

AI Chat App Personalization

Imagine having a personal assistant who knows exactly how you work. They know your role, your industry, the way you think through problems. That's what happens when you personalize your AI tools.

Most people skip this step. They use AI like a generic search engine, getting generic results. But one of AI's superpowers is *personalization*. When it "gets to know" you, conversations become more productive, responses get sharper, and you spend less time clarifying what you actually meant.

This guide is the quick-start, 5 minutes to set up platform-level personalization so AI has your context when it matters. If you want to go further and build a full AI work partner with personality, goals, and evolving context, open **Guides/Build Your AI Sidekick.pdf** in this starter pack. Personalization is the foundation that makes a Sidekick even better.

What You'll Have After

Personalization instructions saved in your AI chat tool that carry across every conversation. Instead of re-explaining your role and context each time, your AI already knows who you are and how you prefer to work.

Why Personalization Matters

Think about the difference between asking a stranger for advice versus asking a trusted colleague who knows your role, your industry, and how you prefer to receive information. The colleague gives you better answers because they have context.

AI works the same way. When you feed it information about yourself, it can:

- Skip unnecessary explanations
- Tailor examples to your industry
- Match your communication style
- Remember your preferences across conversations
- Suggest follow-ups that actually matter to you

Method 1: Let AI Interview You

This is the easiest way to get started. Open your AI chat tool and paste this:

Ask me questions to help you understand how I work, think, and communicate so you can better serve me in all our future interactions.

The AI will ask about your role, your industry, how you like information presented, what kind of work you do most often, and more. Answer honestly and specifically, "I'm a Talent Acquisition Manager at a healthcare company with 2,000 employees" is far more useful than "I work in HR."

After 5-10 questions, ask it to package what it learned:

This is great. Please turn this into personalization instructions I can paste into my AI chat tool's settings.

Copy the output and paste it into your tool's personalization settings:

- **ChatGPT:** Settings > Personalization > Custom Instructions
- **Claude:** Settings > Profile
- **Copilot:** Settings > Personalization

Method 2: Start With an Example

If you'd rather start from a template and customize it, here's an example of what good personalization instructions look like for an HR professional:

- Be highly organized and use clear structure in responses
- I work in HR, tailor examples and advice to people operations, talent management, and organizational development
- When reasoning through a problem, walk me through your thinking step by step before giving a recommendation
- Provide analogies to simplify complex topics
- If you speculate or predict something, tell me explicitly
- If you cite sources, ensure they exist and include URLs
- Offer both pros and cons when discussing solutions
- Suggest follow-up questions I should ask to go deeper
- If I am unclear, ask clarifying questions before proceeding
- Summarize key takeaways at the end of detailed explanations

Your Role and Context

Add a line about who you are:

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{{ Your role and company context. Example: "HR Business Partner at a mid-size financial services company, supporting 300 employees across three offices." }}
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Additional Preferences

Add anything else that shapes how you work:

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{{ Your preferences. Example: "I prefer concise responses. I often need to present recommendations to senior leadership, so help me frame things in business terms. I'm comfortable with data and analytics." }}
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Before and After

Before personalization: You ask "How should I approach stay interviews?" AI gives you a generic overview of stay interviews with examples from manufacturing, tech, and retail that don't match your context.

After personalization: Same question. AI responds with stay interview approaches tailored to your industry, suggests questions relevant to your company size, and frames the recommendation in terms your leadership team would respond to, because it already knows who you are and who you're presenting to.

Next Steps

- **Right now:** Set up personalization in your AI tool using Method 1 or Method 2
- **Go deeper:** Open **Guides/Build Your AI Sidekick.pdf** in this starter pack
- **Optional:** [Persona SuperPrompt \(PDF\)](#) teaches your sidekick to become a specialist on demand

Guide by Neil and Jonathan at [Workplace Labs](#) where we teach people how to leverage AI more effectively in their work through mindsets, frameworks, and practical applications.