RIGHARI.

Free resource

AI Guardrails Starter Kit

Three short templates that help founders and owners set up ChatGPT or Claude so it sounds like the business, stays inside the lines, and leaves the final call with a person.

What's inside

01 Business Brief
The context your AI tool needs every time, with a filled-in example and setup steps

02 Never List and Access Check
What goes in, what it can reach, who owns the account

03 Review Rule Worksheet
Who checks what, and what happens when something slips

+ Bonus
First Workflow Test Card and starter prompt

Time to complete: about 45 minutes. Type straight into it on screen, or print it.



Start here

How to use this kit

Most founders don't have an AI problem. They have a setup problem.

The tool doesn't know the business, nobody wrote down what's off-limits, and every draft quietly lands back on the founder's desk to fix.

This kit fixes that in one sitting. Fill in the three templates in order. Each one builds on the last, and none of them needs to be perfect on the first try. A rough version you actually use beats a polished one that sits in a folder. Not sure what to write? Page 4 shows our own Business Brief, filled in.

Before you start

01 Ask your team which AI tools they're already using, including personal accounts. Write the answers down. You'll use them on page 7. If it's just you, list the tools you use.

02 Pick one repeatable task you'd like AI to help with, like replying to new inquiries or turning meeting notes into action items. Keep it small enough that a mistake would be easy to catch.

03 Save your finished copy somewhere the business owns, like a shared company drive. Not someone's personal account.

After you finish

Load your Business Brief into ChatGPT or Claude using the steps on page 5, so every chat starts with your context. Share the Never List and Review Rule with everyone who uses AI for the business. Then put a date on the calendar, about three months out, to look at all three again.

A quick note

This kit is a practical starting point, not legal advice. If your business handles health, financial, legal, or other regulated information, or your client contracts include confidentiality terms, check with your legal or compliance advisor before using AI on that work.

Template 1 of 3

Business Brief

This is the context you carry around in your head, written down so your AI tool and your team can use it. Keep answers short. If a field doesn't apply, skip it.

What we do
One or two plain sentences, the way you'd say it to a friend

Who we serve
Who buys from you, and who you're not for

What we offer
Your main services or products, with starting prices if you publish them

What we can promise
And what we never promise, like timelines, results, or guarantees

How we sound
A few words that describe your voice, plus one that describes what you're not

Words we use
Terms, phrases, and names you want to see

Words we avoid
Jargon, clichés, competitor terms, anything that isn't you

Examples that sound like us
Links or pasted samples of emails, posts, or pages you're proud of

Always check with a person
Topics AI should flag instead of answering, like pricing exceptions or refunds

Brief owner
Who keeps this current

Last updated
Update when offers or pricing change

Example

Here’s ours: Rishari’s Business Brief

Real answers from our own brief, trimmed to fit. Yours will look different, and that’s the point. Notice how specific each answer is. Vague answers get vague drafts.

What we do	We’re a founder-led marketing studio. We build and run the system behind the business: strategy, website, content, ads, and follow-up.
Who we serve	US-based, founder-led businesses with 1 to 15 people and no one in marketing, where the founder’s name and referrals bring in the business. **Not for:** companies that already have a marketing team.
What we offer	Growth Roadmap from $1,500. AI Setup from $2,000. Systems Setup from $5,000. Brand & Website Build from $7,500. **Monthly:** Paid Ads from $2,000 per channel, Founder Voice System from $6,500, Growth Partner from $5,000.
What we can promise	Fixed prices, with the full number in writing before work starts. Clients own everything we build. Reports in plain English. **Never promise:** lead counts, revenue lifts, rankings, or return on ad spend.
How we sound	Clear, warm, and helpful. Plain English. Relieved, not hyped. **Not:** corporate, salesy, or full of jargon.
Words we use	Founders and owners, founder-led business, follow-up, plain English, booked calls
Words we avoid	Em dashes, “delve,” “unlock,” “game-changer,” and anything that sounds like a pitch deck
Examples that sound like us	“Your name brings in the business. We build the machine that catches it.”
Always check with a person	Discounts, custom scope, Paid Ads budgets over $3,000 a month, and any client result or quote
Brief owner / last updated	Corey Washington / October 2026

Why the “never promise” line matters

Without it, AI tools fill gaps with confident-sounding promises. One line in the brief stops that in every draft.

Template 1, continued

Load your brief into your AI tool

A brief only helps if the tool reads it every time. The easiest way is a project: a workspace that keeps your instructions and files together, so every chat inside it starts with your context.

In ChatGPT

1. Select New project in the sidebar and name it after the work, like “Client emails.”
2. Open the project’s menu (the three dots), choose Project settings, and paste your Business Brief into the instructions.
3. Start new chats from inside the project. Chats outside it won’t see the brief.

In Claude

1. Open Projects and create a new project for the work.
2. Select Set project instructions, paste your Business Brief, and save.
3. Start new chats from inside the project so Claude uses your brief.

Menu names change from time to time. If something looks different, search the tool’s help center for “project instructions.” Some plans limit projects or instruction length. If yours does, upload the brief as a file in the project instead.

Test it in two minutes

Open a new chat in the project and paste this:

> Using our business brief, describe what we do and who we serve in two sentences. Then list anything in the brief that’s unclear or missing.

If the answer sounds like you, you’re set. If it doesn’t, the gaps it lists tell you exactly what to sharpen.

Template 2 of 3

Never List and Access Check

Guardrails are decisions you make before you're busy.

Check the items that apply to your business and add your own in the “Add your own” lines.

Never goes into an AI tool

- [ ] Customer or client personal details (names with contact info, addresses, account numbers)
- [ ] Passwords, login links, or access codes
- [ ] Private financials, bank details, or payroll
- [ ] Anything covered by a client contract, NDA, or confidentiality promise
- [ ] Health, legal, or other regulated information

Add your own

AI never does this for us

- [ ] Invents customer stories, quotes, reviews, or results
- [ ] Makes claims or promises we can’t back up
- [ ] Gives legal, financial, medical, or other professional advice
- [ ] Quotes prices, discounts, or timelines that aren’t in our brief
- [ ] Sends, publishes, pays, or deletes anything without a person approving it

Add your own

Template 2, continued

What our AI tools can reach

Many AI tools can now connect to email, files, calendars, a CRM, or accounting software. List every connection. Start with read-only or draft-only access, and give a tool more only once a workflow has proven itself.

AI tool	Connected to	Access level	Approved by	Review date
Example: Claude	Google Drive (Clients folder)	Read-only	Owner	Jan 15

Access levels: Read-only (can look), Draft-only (can prepare, a person sends), Can act (can send, change, or delete).

Account check

Who owns each AI account?
The business should own it, not one person's personal email

Plan type
Free, personal, team, or business

Training setting checked?
Can our inputs be used to train the provider's models? Note the date you checked

How long chats are kept
From the provider's current settings or policy

Who removes access when someone leaves?
Name a person

Tools the team already uses
From your team check on page 2, including personal accounts

Template 3 of 3

Review Rule Worksheet

AI drafts. A person decides.

Match the review to the risk, so low-stakes work moves fast and anything that matters gets a named owner. If every draft has to go through the founder, the founder becomes the bottleneck AI was supposed to remove.

Type of work	Examples	Who reviews	What they check
Internal	Meeting notes, outlines, first drafts for the team	Whoever uses it	Is it accurate enough to act on?
Client-facing	Emails, proposals, follow-ups		Facts, tone, promises, names
Public	Blog posts, social posts, web pages		Claims, sources, brand voice
Sensitive	Pricing, contracts, money, anything regulated		Everything, line by line

Just you?

Write “Me” in the “Who reviews” column and treat “What they check” as your checklist. You’ll check the things that matter instead of rewriting every draft. When you bring in help, hand them this page.

When something slips

Sooner or later someone will paste something they shouldn't or send a draft with a mistake in it. Decide now what happens, so telling quickly feels like the right move instead of a risk.

Who to tell first
Name and best way to reach them

First steps
For example: stop the workflow, delete the chat if possible, correct the message, tell the client if needed

How we’ll answer if a client asks whether AI helped
Write the one or two sentences you’d actually say

Bonus

First Workflow Test Card

Run one small workflow for a week or two before adding anything else. Fill in the top before you start and the bottom after about five uses.

Before you start

The task
What AI is helping with

Workflow owner
One person

Time it takes today
Before AI, roughly how long?

What a good draft looks like
So everyone judges it the same way

Where the prompt is saved
Somewhere the team can find it

After about five uses

Did it save time?
On the part of the job it was meant to help with

Did drafts need heavy fixing?
If the old way was easier, adjust the brief or the prompt

Is anyone unclear who decides?
If so, revisit the Review Rule

What we'll change
One adjustment for the next round

Bonus

Starter prompt

A prompt that asks for “an email” leaves the tool guessing. This one gives it a job. Copy it, swap in your details, and save it where the work happens.

> Draft a short reply to this new inquiry using our business brief. Thank them, answer only what they asked, and suggest a 30-minute call. Don’t promise timelines or prices, and don’t make up details. Flag anything you’re unsure about. I will review it before it’s sent.

Make any prompt work harder

Good prompts answer four questions: what the input is, what the output should be, what the tool must not assume, and who reviews it. Add the last one every time. It reminds the tool, and your team, that a person still owns the result.

Want it set up for you?

Rishari's AI Setup turns a recorded interview into eight context files about your business, configures ChatGPT or Claude around your real work, and tests the prompts your team will use. We never take a password, and everything we build stays in your accounts.

Book a 30-minute fit call or email hello@rishari.com