ChatGPT Part 6: Personalisation and Reusable Instructions

Personalisation helps ChatGPT carry useful preferences into later work, so we stop repeating ourselves. It offers three tools: custom instructions, memory and projects. A saved preference is not a guarantee, so four steps keep it reliable: keep, write, place and test. Each step answers one simple question. In this part, Karim, an operations manager at a logistics company, shows how it works.

1. Keep

Not everything deserves to be saved. A preference belongs in reusable guidance only if it stays true across many tasks, such as the reader, the tone, the structure or the language. A one-time fact, such as this week's delay or one client's name, belongs in the chat or the project where it is needed. The question is: will this still be true next month? Sensitive or confidential details stay out of saved text unless company rules allow them. Memory may reflect relevant past chats, but it never keeps everything, so we cannot rely on it for facts.

Example: A teacher writes to parents every week. She asks the Keep question: will this still be true next month? She saves the friendly tone and the short format, but not the date of one school trip.

At work: Karim writes a weekly carrier performance update for his executives. He lists everything he retypes, then asks the Keep question: will this still be true next month? Plain English, a summary first, decisions with owners and flagged gaps pass the test. This week's port delay and one carrier's name do not, so they stay out.

2. Write

A saved instruction is only as good as its wording. A vague rule such as be professional gives ChatGPT nothing to apply. A strong rule names the document, the reader, the structure and the limits, and says what to do when information is missing. The question is: could a new colleague follow this without asking us anything? We keep each rule short, remove rules that conflict, and add one short example only when a format is hard to describe. A rule shapes how ChatGPT writes, but it never supplies the facts.

Example: A manager tells her new assistant to make the minutes better. She asks the Write question: could a new colleague follow this without asking? The answer is no, so she rewrites it: decisions first, then actions with an owner and a date.

At work: First, Karim saves a weak rule: be professional and make my reports better. Then he asks for the weekly carrier update. The answer is polite but vague: carriers performed well overall, some deliveries were late for various reasons, and there is no decision and no owner. He asks the Write question: could a new colleague follow this without asking? Clearly not. So he rewrites it as three rules: use plain English with a short summary first, list decisions and actions with an owner and a date, and flag anything missing instead of guessing. Now the same request returns a one-page update: the northern routes recovered, the coastal route is still slipping, and the decision is to approve a backup carrier. One action has no owner, so ChatGPT flags it for confirmation.

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3. Place

Reusable guidance can live in three places, and each has a different reach. Custom instructions apply across our chats. Memory may bring in relevant details from earlier conversations, depending on the account and settings. A project keeps its own instructions and files together for one body of work. The question is: who needs to see this, every chat or only one project? We choose the narrowest place that fits. Availability and controls vary by plan, region and workspace, so we check what our own account shows.

Example: A café owner uses one house style for all her emails, but one seasonal menu has its own launch date. She asks the Place question: who needs to see this, every chat or only one project? She keeps the house style in her general guidance and puts the menu in one project.

At work: Karim has a report structure for every update, but his customer service project also has an approved glossary and a fixed review date. He asks the Place question: who needs to see this, every chat or only one project? The report structure goes into his custom instructions. The glossary and the date go into the project, so they never leak into unrelated chats.

4. Test

Saved guidance is a draft, not a promise. We test it with a typical request and with an awkward one, such as a report with no named owner or an uncertain date. The question is: what happens when information is missing? We check whether the answer follows the format and whether it marks what is unknown. If a rule no longer fits, we edit or delete it in the settings or in the project. A changed rule guides future chats, but it may not rewrite earlier ones. We also review the privacy controls, especially when connected apps or workplace sources are involved.

Example: An accountant saves a rule for monthly summaries. She asks the Test question: what happens when information is missing? She runs one complete report and one without a confirmed total, and checks that the second one is flagged instead of filled in.

At work: Karim tests his saved rules with last week's full notes and with notes that name no owner. He asks the Test question: what happens when information is missing? The second update flags the gap instead of inventing a name, but it mixes decisions with actions, so he tightens one rule and tests again.

Conclusion

In summary, personalisation pays off when four steps are followed. We keep only what stays true, write rules that a new colleague could follow, place each one where it belongs, and test it with an awkward case. Before saving anything, the key question is simple: would we be comfortable if ChatGPT applied this rule to every task?

Sources

- OpenAI Help Center: Projects in ChatGPT – https://help.openai.com/en/articles/10169521-projects-in-chatgpt
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