

PROMPTING CHEAT SHEET

5 Archetypes · 6 Guiderails · 5 Worked Examples

1 THE 5 PROMPTING ARCHETYPES — choose the right approach, then add guiderails

ARCHETYPE	OPENING TEMPLATE	WHEN TO USE	EXAMPLES
ROLE BASED	You are an expert [Consultant / Auditor / Advisor] at a professional services firm. Your task is to [task]. Work only from the inputs provided.	Starting point for almost every professional task	Client proposals, client emails, executive memos, advisory notes
FEW SHOT	Here is an example of the output I want: [paste example]. Based on this and the inputs attached, produce a [same type] for [new subject].	Recurring documents where format consistency matters	Monthly reports, board packs, standard client deliverables, thought leadership content, press release, statement of work, engagement contract
META PROMPT	I need a reusable prompt for: [task]. Draft it, then tell me: what context am I missing that would make it better?	Help required to crystallise thinking, creating new propositions or visualisations	Use case library entries, team prompt templates, training materials, team dashboards, mini-applications and artefacts to share across teams
CHAIN OF THOUGHT	Carry out this task: [task]. Think step-by-step, explain your reasoning at each stage, then give the final answer. Flag any step where you are uncertain.	Complex analysis requiring visible reasoning	Legal opinions, accounting treatment, regulatory analysis
RAG	Using ONLY the attached documents, [task]. Cite the document name for every fact. If a fact is not in the documents, say "Not found in source".	Any task grounded in specific source material	Standards research, accounts generation, financial analysis, regulatory guidance

2 THE 6 GUIDERAILS — add one or more of these lines to any prompt to control output quality

GUIDERAIL	PURPOSE	ADD THIS TO YOUR PROMPT
SEARCH	Control where Claude looks	"Only consider official regulatory and government sources. Exclude anything behind a paywall."
DATA SOURCES	Restrict to specific inputs	"Base your answer only on the attached documents. Do not use general knowledge or training data."
COMPLIANCE	Align with policy & regulation	"Flag any area that conflicts with [applicable regulation / policy] or that requires senior review before use."
STYLE	Shape tone, format, structure	"Format as: 1) Executive Summary 2) Key Obligations 3) Recommended Actions. Tone: formal, client-facing."
FAIRNESS	Verify for bias & audience suitability	"Check for assumptions that could introduce bias. Flag any conflict with the client's local regulatory or cultural context."
ACCURACY	Force citation & uncertainty flagging	"Cite the document name for every fact. Use [NEEDS VERIFICATION] for anything not confirmed in the inputs."

3 FIVE WORKED EXAMPLES — copy the structure, swap the content

EXAMPLE 1 Regulatory Advisory Note Role Based + RAG + Compliance + Accuracy	PROMPT: You are an expert Regulatory Advisor at a professional services firm. Using ONLY the attached legislation and regulatory guidance, identify compliance obligations for the client. Cite article numbers for every reference. Use [NEEDS VERIFICATION] for anything not confirmed. Flag areas requiring senior review. Format: 1) Summary 2) Key Obligations 3) Actions. RESULT: Cited, structured advisory note with flagged review areas. Saves 60–120 mins. Risk: Medium — requires manager sign-off before delivery.
EXAMPLE 2 Client Proposal / Engagement Letter Role Based + Few Shot + Chain of Thought + Data Sources	PROMPT: You are a senior advisor at a professional services firm. Here is an engagement letter / proposal we produced last quarter: [paste example]. Using ONLY the client briefing notes attached, produce a comparable proposal for [new client / engagement]. Think step-by-step through the scope and fee structure before drafting. Flag any area where information is missing. RESULT: Consistent, on-brand proposal ready for partner review. Saves 90–120 mins per proposal. Risk: Medium — peer review required.
EXAMPLE 3 Data Reconciliation & Validation Role Based + Data Sources + Compliance + Accuracy	PROMPT: You are a data reviewer at a professional services firm. Using ONLY the reconciliation data and applicable standards attached, identify discrepancies between calculated and expected values. Flag any line where figures differ from source data. Do not make corrections — output a discrepancy list for human review only. RESULT: Discrepancy report for human review. Saves 2+ hrs per reconciliation cycle. ■ EU AI Act: AI used in employment/HR decisions may require Annex III assessment. Review: Senior + AI Lead.
EXAMPLE 4 Commercial Performance Dashboard Meta Prompt + Role Based + Data Sources + Style	PROMPT: I need a reusable prompt to create an interactive dashboard that visualises this month's commercial performance. The dashboard should include: revenue by business line, sales funnel conversion rates, comparison against monthly target, and 12-month trend. Draft the prompt, then tell me: what context am I missing that would make it better? Use ONLY the attached CRM data and sales report. RESULT: Reusable prompt + visual dashboard with bar charts, KPIs and RAG status indicators. Saves 2–3 hours of manual preparation. Risk: Low — verify figures with controlling team before presenting.
EXAMPLE 5 Automatic Invoice Generator Meta Prompt + Chain of Thought + Compliance + Accuracy	PROMPT: I need a reusable prompt to build an interactive tool that generates invoices automatically. The tool should: collect client and engagement data, calculate amounts with VAT based on jurisdiction, apply corporate template, and export as PDF. Think step-by-step through the legal invoicing requirements before designing. Flag any area that conflicts with current tax regulations. RESULT: Interactive tool that generates compliant invoices in PDF. Saves 30–45 mins per invoice. Risk: High — requires tax advisory validation and format review by finance department before deployment.