

CUSTOM GPT MASTER CHECKLIST

Left Brain AI
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Your Complete, Step-by-Step System to Build a High-Impact GPT — No Experience Required

By [Left Brain AI](#)

Follow this detailed action-based guide to plan, build, test, and optimize your own Custom GPT — even if you're new to AI. Each step outlines exactly what to do, why it matters, and how to execute it confidently. If you don't already have one, create an account with OpenAI before following this checklist.

For more AI and automation resources, check out [LeftBrainEnterprises.biz](#)

Phase #1 - Prep

Strategize Before You Build

- **Define your objective**
 - ☐ Write down the primary business goal your GPT will support (e.g., “Help Sales qualify leads faster”, “create a blog article”)
 - Only have 1 objective per GPT. Create more if there are separate use cases
 - ☐ Define the final outcome you want (e.g., “Get a daily report showing top qualified leads”)
 - ☐ Describe the type of GPT you're building: assistant, data analyst, writer, etc.
- **Identify Users**
 - ☐ List every person or role who will use the GPT
 - ☐ Interview or survey them: What do they need? What slows them down?
 - ☐ Map the GPT's expected workflow into their daily tasks
- **Outline Key Features**
 - ☐ List 3–5 must-have features (e.g., “Summarizes emails,” “Categorizes product feedback”)
 - ☐ Describe how each feature works in detail (what data it needs, what format the output takes)
 - ☐ Rank them by priority: what must work on day one?
- **Define What's Out of Scope**
 - ☐ Identify features the GPT will NOT handle (e.g., “Won't analyze legal contracts”)
 - ☐ Set clear boundaries to prevent confusion or mission creep
- **Define the Personality & Style (Non-Functional Requirements)**
 - ☐ Choose a tone: formal, friendly, technical, executive
 - ☐ Identify ethical standards (e.g., “Don't make assumptions,” “Avoid speculative language”)
 - ☐ Describe the desired user experience (quick? detailed? interactive?)
- **Create GPT**
 - ☐ After logging into ChatGPT, click on your profile in the top right corner. Then select Customize GPT
 - Fill in the information. Be specific.
 - ☐ In the left nav, click “GPTs”.

- Click “Create” in the top right.
- Fill in the “Configure section”
- In the Knowledge section, be sure to upload documents and literature that are sources of reference for the GPT (e.g. brand and tone docs, examples of your desired outcome)

Phase #2 - Prompt

Build the GPT's Brain

- **Provide Context**
 - ☐ Explain the business problem in 1–2 sentences (e.g., “Our sales team spends 5 hours/week compiling lead data. We need to automate that.”)
 - ☐ Add helpful background: what data sources, processes, or stakeholders are involved?
- **Write Clear Instructions**
 - ☐ Assign the GPT a role: “You are a marketing analyst that...”
 - ☐ Set guardrails: “Do not generate financial predictions or personal opinions.”
 - ☐ Break the main task into logical steps (depending on the GPTs training, results might be better doing each step individually)
 - Example:
 - 1. Analyze weekly performance data
 - 2. Extract top trends
 - 3. Generate a 1-paragraph summary
 - 4. Output a table of MQLs
 - ☐ Choose formatting rules: tables, bullet lists, plain paragraphs, etc.

Phase #3 - Test

Validate and Troubleshoot

- **Test Basic Functions**
 - ☐ Run 3 simple scenarios (e.g., “Summarize this email” or “List MQLs from this spreadsheet”)
 - ☐ Assign a grade (A–F) for each based on accuracy, clarity, and consistency
 - ☐ Write down what worked and what didn't
- **Test Intermediate Tasks**
 - ☐ Try tasks that require deeper logic or multiple steps (e.g., “Summarize the top 3 trends from last month's reports and recommend next actions”)
 - ☐ Watch how well it understands nuance and user intent
 - ☐ Keep grading and documenting
- **Test Advanced Scenarios**
 - ☐ Introduce edge cases or errors (e.g., broken formatting, vague input)
 - ☐ See how the GPT handles confusion or incomplete instructions
 - ☐ Ensure it responds gracefully and doesn't hallucinate (make up answers or information) or give bad advice

Phase #4 - Polish

Improve and Deploy

- **Identify Top Priorities**

- ☐ From your test notes, highlight 3 main improvement areas (e.g., “Misunderstands lead stages”)
- ☐ Prioritize by impact: what change would help users the most?
- **Make and Document Adjustments**
 - ☐ Rewrite parts of the prompt where behavior went wrong
 - ☐ Add or remove features as needed
 - ☐ Revisit the Configuration settings
 - ☐ Retest any changes with the original use cases
- **Final Validation**
 - ☐ Confirm the GPT meets its original business goal
 - ☐ Have actual users test it and give feedback
 - ☐ Make final tweaks before rollout
 - ☐ Create user / organization instructions (e.g. don't build off other member's tasks and chats)
 - ☐ Create shareable link for all users

Notes

Want Help? Let's Build It Together

Need expert support to build or refine your Custom GPT?

- ◆ Book a session at leftbrainenterprises.biz/contact-us
- ◆ Let's create your AI-powered future — today.

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