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The Business Conference for Small Firm Entrepreneur Architects

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Gaylord Opryland Resort & Convention Center

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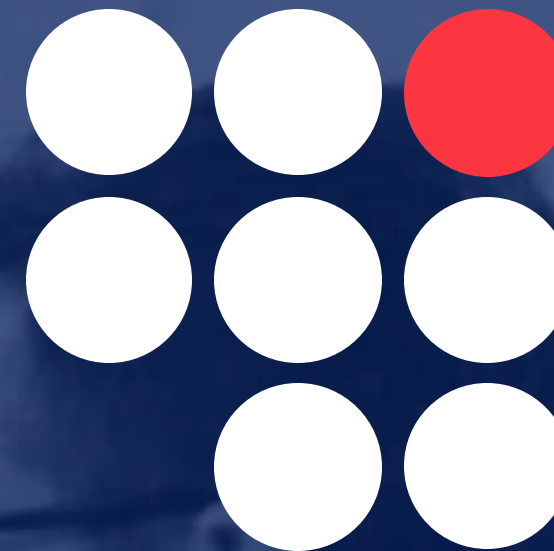


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GPTs for Architects

How to Leverage AI for Profit and Productivity

Imagine you were able to
complete 8+ hours per week,
without having to do that work!



What would you do with
that extra time?



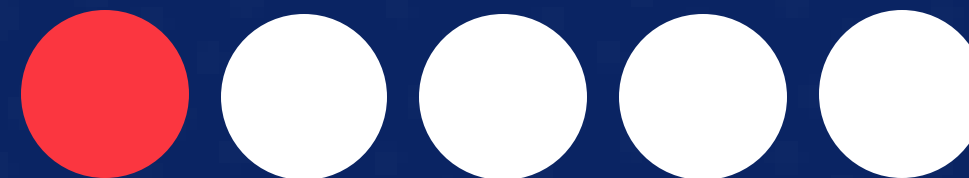
This is the Power & Potential of Custom GPTS



Agenda

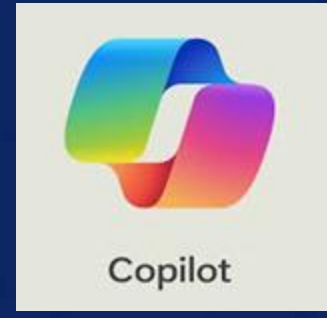
- Understanding Custom GPTs
- Build Your Custom GPT
- Final Thoughts & Tips

Understanding Generative Pre-trained Transformers (GPTs)



What Are Custom GPTs?

Large Language Models



UNDERSTANDING DIFFERENCES:

How Are Custom GPTs Different

Custom GPTs are personalized versions of ChatGPT trained to perform unique tasks for YOU.

- Fully Customizable
 - Tailored Behavior
 - Specialized Knowledge
 - Personalized Branding
 - Built for Specific Workflows
 - Task Automation

How to Train Your Custom GPT

- **Control**
 - Custom Instructions
 - Upload Knowledge Base Docs
 - Automation Actions/Integrations
- **Capabilities**
 - Web Browsing
 - DALL-E Image Generation
 - Code Interpreter Data Analysis
- **Sharing**
 - Private
 - Shared Link
 - Public

Benefits of Using Custom GPTs for Architects

- **Saving Time**
 - Task Automation
 - Content Creation
 - Research & Analysis
- **Improving Accuracy & Consistency**
 - Checklist & Template Creation
 - Quality Control & Skill Gaps
 - Compliance Review
- **Increasing Efficiency**
 - Streamlined Workflows
 - Improved Collaboration
 - Faster Turnaround

Let's Build a Custom GPT



Let's Build a Custom GPT Together

HANDS-ON EXERCISE:

Follow Along to Build A Custom GPT

What you will need to follow along with us:

- Your Laptop
- Connection to Wifi
- A ChatGPT Subscription (\$20/mo)
- GPTs for Architects Workbook (fillable PDF)

GPTS FOR ARCHITECTS:

How to Leverage AI for Profit and Productivity

Presented by Bryon McCartney and Emily Fischer →

Defining Your GPT's Purpose and Role

Exercise 1: Identifying Key Tasks

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Step 1: Define Your GPT's Purpose & Role

EXERCISE 1:

Identifying Key Tasks To Automate

Think about the tasks you encounter in your practice using the following categories:

- Tasks you don't have time for...
- Tasks you do over and over...
- Tasks you dislike doing...
- Tasks you're currently not doing but should be doing...

GPTS FOR ARCHITECTS:

How to Leverage AI for Profit and Productivity

Presented by Bryon McCartney and Emily Fischer →

Defining Your GPT's Purpose and Role

Exercise 1: Identifying Key Tasks

Tasks I don't have time for...

Tasks I do over and over...

Tasks I dislike doing...

Tasks I'm not doing but should be doing...

How many tasks can you list in 5 minutes?

ARCHMARK BRANDING & MARKETING

A Short List of Things You Could Do with Custom GPTs

Client Communications & Relations

- Drafting project update emails for clients
- Summarizing meeting and creating action items
- Generating tailored responses to initial client inquiries
- Composing follow-up emails after client presentations
- Developing client-specific FAQs for each project

Project Management

- Creating project timelines with key milestones
- Generating detailed task lists for team members/VAs
- Drafting weekly project status reports
- Developing assessment reports for ongoing projects
- Creating resource allocation plans

Marketing & Business Development

- Writing engaging blog posts
- Crafting compelling case studies
- Generating targeted social media content
- Developing customized pitch decks
- Creating industry-specific whitepapers

Ideation & Design

- Generating design briefs based on client input
- Creating checklists for key design considerations
- Creating presentations to explain design decisions
- Analyzing floor/space planning recommendations
- Drafting project-specific design guidelines

Proposal & Contract Writing

- Generating initial project proposals
- Drafting detailed scope of work documents
- Creating fee proposals with itemized services
- Developing project-specific contract templates
- Writing executive summaries for complex proposals

Operations & Overhead

- Drafting job descriptions for new hires
- Creating employee onboarding & training materials
- Generating financial reports & budget forecasts
- Developing internal policy documents & procedures
- Creating project post-mortem reports

Step 1: Define Your GPT's Purpose & Role

EXERCISE 2:

Creating Your GPT's Job Description

Write a job description for your GPT.

- Choose one task from your list.
- Start with an overview of the task.
- List specific skills needed for this task.
- List specific knowledge needed.
- What other info would help?

Exercise 2: Creating a Job Description for Your GPT

Blog Writer

Create high-quality blog posts using a storytelling-based approach, that will engage and resonate with our audience.

Skills Needed

- Topic Research
- Strong writing skills

Knowledge Needed

- An understanding of SEO best practices.
- An understanding of branding
- Info about our firm
- Info about our strategic goals

Take 5 minutes to write a GPT job description.

Step 2: Define Your GPT's Persona & Behavior

Crafting Your GPT's Persona

Exercise 3: Developing a Persona Profile

Professional	Bold/Daring
Friendly	Challenge the Status Quo
Factual	Passionate
Concise	Enthusiastic

EXERCISE 3:

Developing a Persona Profile

Describe your Custom GPT's persona.

PRO TIP: Think about how you like to interact with clients or colleagues.

- Use words that describe its personality.
- What characteristics are important?

Take 3 minutes to define your GPT's persona.

Ideas for Describing Your Custom GPT's Persona

Friendly	Humorous	Empathetic	Optimistic	Introverted
Patient	Creative	Daring	Serious	Detached
Authoritative	Pessimistic	Extroverted	Impatient	Logical
Cautious	Warm	Cold	Expressive	Neutral
Anxious	Calm	Supportive	Critical	Decisive
Indecisive	Consistent	Unpredictable	Open-minded	Closed-minded
Traditional	Progressive	Ethical	Unethical	Independent
Collaborative	Reactive	Proactive	Blunt	Diplomatic

Step 2: Define Your GPT's Persona & Behavior

EXERCISE 3 Cont'd:

Developing a Behavior Profile

Continue with the Behavior Checklist

- Review and select your GPT's behaviors
- You can add behaviors to this list
- Skip behaviors that do not apply.

Take 2 minutes to complete the behaviors checklist.

GPT Behavior Checklist

Exercise 3: Check "Yes" or "No" below based on your preferred behaviors

Should the GPT...

- ☐ Yes ☒ No Provide detailed explanations for its responses?
- ☐ Yes ☒ No Simplify technical language for clients?
- ☒ Yes ☐ No List any assumptions it makes in its responses?
- ☐ Yes ☒ No Use a formal tone in all communications?
- ☐ Yes ☐ No Prioritize brevity and conciseness?
- ☐ Yes ☐ No Offer alternative options or solutions when answering questions?
- ☐ Yes ☐ No Clarify project-specific details (e.g., timelines, budgets) in responses?
- ☐ Yes ☐ No Ask follow-up questions to gather more information when needed?
- ☐ Yes ☐ No Include references or citations (e.g., codes, standards) when applicable?
- ☐ Yes ☐ No Offer creative suggestions in design-related tasks?
- ☐ Yes ☐ No Explain its reasoning or logic behind the answers?
- ☐ Yes ☐ No Mimic your personal writing style (e.g., tone, voice) in all communications?
- ☐ Yes ☐ No Address the reader by name when possible?
- ☐ Yes ☐ No Ask for feedback after providing responses?
- ☐ Yes ☐ No Adapt its tone depending on the client's familiarity with architectural terms?

Step 3: Gathering & Organizing Training Data

Gathering and Organizing Training Data

Exercise 4: Compiling Data

Examples of Training Data (docs)

- Recent Emails
- Past Articles I've written
- Past Social Posts
- Client Onboarding Information
- Client Interviews & Surveys
- Research/Analysis
- Cost Estimation Spreadsheet
- Local Building Code
- Brand Guidelines
- Ideal Client Persona
- Brand Messaging Examples
- Collateral Materials (Brochures, Handouts)

EXERCISE 4:

Compiling Training Data

List any documents needed to train your GPT for this task. Use the following criteria:

- Is the data useful to performing the task?
- Does it reflect my firm's brand, style, tone?
- Is it appropriate for my target audience?
- Are there key takeaways the GPT should incorporate into its responses?

Take 5 minutes to list training data you will use.

Step 4: Understanding Your Writing Style

EXERCISE 5:

The Tone & Style Sliders

Complete the sliders to ensure your GPT aligns with your communication style. Start by analyzing your own writing:

- How do you want to be perceived?
- Which elements are important to you?
- Which dimensions would you add?

PRO TIP: Ask ChatGPT to analyze your own writing to make it sound like you.

Understanding and Analyzing Your Writing Style

Exercise 5: Analyzing Your Own Writing Samples Tone and Style scale

Score your writing in the box across the following dimensions:

Formality - How formal or informal should the tone be?	Result
More Informal 1 2 3 4 5 6 7 8 9 10 More Formal	<input type="text" value="3"/>
Enthusiasm - How enthusiastic or reserved should the language be?	Result
More Detached 1 2 3 4 5 6 7 8 9 10 More Enthusiastic	<input type="text" value="7"/>
Detail - How detailed or concise should the responses be?	Result
More Concise 1 2 3 4 5 6 7 8 9 10 More Detailed	<input type="text" value="6"/>
Technicality - How technical should the language be?	Result
More Basic 1 2 3 4 5 6 7 8 9 10 More Technical	<input type="text" value="4"/>
Directness - How direct or tactful should the responses be?	Result
More Subtle 1 2 3 4 5 6 7 8 9 10 More Direct	<input type="text"/>
Professionalism - How professional or casual should the tone be?	Result
More Casual 1 2 3 4 5 6 7 8 9 10 More Professional	<input type="text"/>
Creativity - How creative or straightforward should the responses be?	Result
Straightforward 1 2 3 4 5 6 7 8 9 10 More Creative	<input type="text"/>
Persuasiveness - How persuasive should the language be?	Result
More Informative 1 2 3 4 5 6 7 8 9 10 Highly Persuasive	<input type="text"/>
Friendliness - How friendly or neutral should the responses be?	Result
More Reserved 1 2 3 4 5 6 7 8 9 10 More Friendly	<input type="text"/>

Take 5 minutes to fill in the tone & style map.

Step 5: Create Conversation Starters for Your GPT

EXERCISE 6:

Turn Tasks Into Conversation Starters

Create questions or prompts that will help you get started using the Custom GPT:

- Requests that you will repeatedly use with the Custom GPT
- “Ask me questions one by one to...” as a starting point to using the Custom GPT
- Questions that help you get unstuck

Take 5 minutes to list out potential conversation starters.

Creating Conversation Starters for Your Custom GPT

Exercise 6: Turning Tasks Into Conversation Starters

Examples of Conversation Starters

- “Ask me questions one-by-one to guide me to a list of topics for my blog.”
- “Draft an email introducing our architectural services and recent projects to a potential client.”
- Write a polite follow-up email for a project proposal we submitted last week.”
- “Draft an update email for a client on the status of their current project, including milestones reached and the next steps in the timeline.”
- “Create a blog post about the latest trends in office building design. Keep it concise and highlight any innovations we've used in our recent projects.”

Step 6: Setup and Configure Your GPT

New GPT

• Draft

...

Create

CreateConfigure

+

Name

Name your GPT

Description

Add a short description about what this GPT does

Instructions

What does this GPT do? How does it behave? What should it avoid doing?

Conversation starters

X

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be downloaded when Code Interpreter is enabled

Upload files

Preview

Message GPT

?

Step 6: Setup and Configure Your Custom GPT

EXERCISE 7:

Configure Your GPT: Purpose & Role

- Copy the job description from Exercise 2 of the workbook
- Paste this into Exercise 7

GPT Setup and Configuration

Exercise 7: Configuring Your Custom GPT

- Yellow = Purpose and Role
- Red = Persona
- Green = Specific Task Instructions

- Purpose & Role

Test & Refine

Ask the GPT to create something (email, blog post, etc.) - Analyze the response.

- Is the GPT pulling from the training data?

Take 1 minute to copy and paste the job description.

Step 6: Setup and Configure Your Custom GPT

EXERCISE 7:

Configure Your GPT: Persona

Prompt: "Using my answers for Exercise 3 and Exercise X, write a detailed persona for my custom GPT. Incorporate the characteristics, behaviors, and preferences outlined in those exercises to create a complete profile for how my GPT should interact and respond."

Take 2 minutes to create a detailed persona.

GPT Setup and Configuration

Exercise 7: Configuring Your Custom GPT

- Yellow = Purpose and Role
- Red = Persona
- Green = Specific Task Instructions

- Purpose & Role
- Persona

Test & Refine

Ask the GPT to create something (email, blog post, etc.) - Analyze the response.

- Is the GPT pulling from the training data?

Step 6: Setup and Configure Your Custom GPT

EXERCISE 7:

Configure Your GPT: Tone & Style

Prompt: Using my responses from Exercise 5, generate a style and tone guide based on the numbers I provided. Please analyze the following dimensions: formality, enthusiasm, detail, technicality, directness, professionalism, creativity, persuasiveness, friendliness, and humor. Create a guide that reflects these preferences and provides a summary of my overall writing style

Take 3 minutes to create your style and tone guide.

GPT Setup and Configuration

Exercise 7: Configuring Your Custom GPT

- Yellow = Purpose and Role
- Red = Persona
- Green = Specific Task Instructions

- Purpose & Role
- Persona
- Tone & Style

Test & Refine

Ask the GPT to create something (email, blog post, etc.) - Analyze the response.

- Is the GPT pulling from the training data?

Step 6: Setup and Configure Your GPT

New GPT

Draft

Create

CreateConfigure

Add a short description about what this GPT does

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Conversation starters

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be downloaded when Code Interpreter is enabled

Upload files

Capabilities

☒ Web Browsing

☒ DALL·E Image Generation

☐ Code Interpreter & Data Analysis

Actions

Create new action

Preview

Message GPT

Step 8: Testing & Refining Your Custom GPT

TESTING & REFINEMENT:

Improving Your Custom GPT

Test analyze how your Custom GPT performs the task.

- Is the output what you expect?
- Is the GPT pulling from its training data?
- Is the output structured correctly?
- Refine & improve the configuration to get the results you want.

Test & Refine

Ask the GPT to create something (email, blog post, etc.) - Analyze the response.

- Is the GPT pulling from the training data?
- Is the output structured correctly?
- What tweaks would you make to the output?

Adjust your GPT based on your responses or ask your GPT what it needs to make those tweaks.

It's important to test & refine your Custom GPT.

Additional Custom GPT Resources

LEARN MORE ABOUT CUSTOM GPTS: Resources to Help You

Check out the resources in your workbook

- Open AI GPT Documentation
- Best Practices for Training A Custom GPT
- Skill Leap AI Training Courses

Additional Resources

1. OpenAI GPT Documentation

The official GPT documentation is a valuable resource for learning more about the technical side of creating and fine-tuning your GPT. It covers everything from model limitations to API integration.

- [OpenAI Documentation](#)

2. Best Practices for Training a Custom GPT

This guide provides practical tips on how to gather training data, write effective prompts, and refine your GPT's outputs for better performance.

- [Best Practices for Training GPTs](#)

3. SkillLeap

SkillLeap is an educational platform that offers interactive courses on how to use AI tools like GPTs in various industries. This resource is perfect for learning how to incorporate AI into your daily workflows, including advanced GPT usage.

- [SkillLeap](#)

Final Thoughts

What to put here?

PUTTING WHAT YOU LEARN TO ACTION:

Making the Most of Custom GPTs

Creating your first Custom GPT is just a starting point.

- Create GPTs for other tasks.
- Integrate AI into your routines.
- The more you use and improve the GPT, the better it will become.
- Think of your GPTs as assistants.
- See how much time you can save.

Wrap-up & Q&A



JOIN THE WAITLIST | NEW COURSE COMING 2025

GPTs for **ARCHITECTS**

Unlock the Power of AI for Your Architecture Firm

AI is changing the way architects work, and the GPTs for Architects course is your chance to stay ahead of the curve. Join the waitlist today to be eligible for a 20% discount when registration opens in late 2024.

<https://www.archmark.co/ai-course-waitlist>



Thank You

