LASTMILEFIRST

Prompts and Context

A field guide. The prompt is the assignment. The context is the room.

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THE PROBLEM

The search-box hangover.

Most professionals treat AI like a search engine.

Every morning they re-onboard the same assistant that knows nothing about them: the same five sentences of background, the same disclaimers, the same audience cues, typed again from scratch.

The output is generic because the input is generic. The effort compounds. The work doesn't.

ANATOMY OF A BRIEF

The five briefing elements.

01

Role

Who is the model being right now?

02

Context

What isn't obvious? Audience, history, stakes.

03

Task

The verb. Draft, summarize, compare, critique.

04

Constraints

Length, format, tone, what to avoid.

05

Quality

What makes it excellent, not just acceptable?

Skip one and the model guesses. It may guess wrong.

THE SAME DEAL, ASKED TWICE

500 deals a year. Five investments. One came in this morning.

SEARCH MODE

“Should we take the meeting?”
+ the teaser

A checklist that fits any deal.

BRIEFING MODE · ALL FIVE ELEMENTS

Role. You’re the investment lead at a single-family office.

Context. We see about 500 deals a year and do five. Our thesis is X. Our check is Y. We never do Z.

Task. Screen the teaser below. Take the meeting, pass, or ask for one more thing first.

Constraints. Half a page. Lead with the recommendation. Name the one question that decides it.

Quality. Excellent means a partner reads it and knows what to do without opening the deck.

Same model. The brief took thirty seconds longer to type.

SAME TASK, THREE REGISTERS

Explore, execute, challenge.

Discovery

"What are five angles I haven't considered?"

Open it up. Failure mode: narrowing too early.

Production

"Given what we've decided, draft it to spec."

Close it down. Failure mode: being vague.

Verification

"Where is this wrong, weak, or unsupported?"

Pressure-test. The least used and most valuable.

Most people only ever ask for production.

THREE FRAMING MOVES

Have it ask questions before it writes.

NOT SO FAST

"Don't start working. Interview me first. Ask the five questions you most need answered before you could do this well."

TWO POINTS OF VIEW

"Argue this from two opposing positions. Which is stronger, and what would change your mind?"

THE HARD READ

"A colleague drafted this. What's weak, wrong, or unsupported? Assume I want the hard read."

The whole idea in one line

The prompt is the assignment. The context is the room.

THE ROOM

Which of those five will still be true for deal 501?

TRUE FOR EVERY DEAL · THE ROOM

Role. Investment lead at a single-family office.

Context. 500 a year, five a year. The thesis. The check. The no's.

Quality. A partner can act without opening the deck.

CHANGES EVERY TIME · THE ASSIGNMENT

Task. Screen this one.

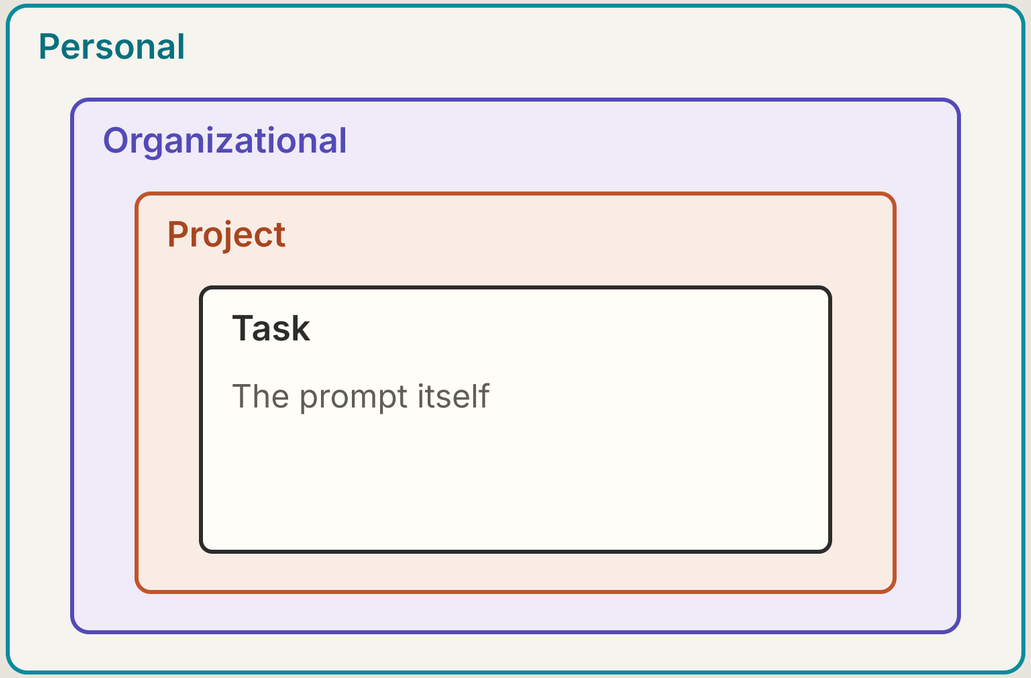
Constraints. Half a page, this time.

The teaser.

"Take everything I told you about how we invest, and write it as a standing profile I can reuse. Phrase it as rules. Leave out anything that was only about this deal."

BUILDING THE ROOM

One question sorts your context: how often is this true?



True everywhere you work

Your role, your writing defaults, how you like to work

True across the firm

Voice, compliance posture, approved sources, house style

True for this engagement

A client, deal, or matter, with a start and an end

True for this one prompt

The assignment in front of you. Not worth saving.

BUILDING THE ROOM

Every tool has a place for each tier. The names differ; the idea doesn’t.

Tier	In Claude	Elsewhere
Personal	Settings → Profile (or a personal CLAUDE.md)	Custom instructions, a user profile
Organizational	A shared Project, or the Profile	A shared workspace or team setting
Project	A Project’s instructions and files	A project folder, a workspace
Task	The prompt	The prompt

The vocabulary will keep changing. The stack won’t.

THE PERSONAL TIER

A profile is operating rules, not a bio.

Separate who you are from how you want it to work
A short paragraph of durable background, then standing rules.

Phrase rules to persist
“Please do X” is a one-time ask. “Always do X” is a standing rule.

Keep “currently” out of it
Anything that starts with “currently” belongs in the prompt.

Set a friction dial
Default to the extra work, with a one-word escape hatch for quick tasks.

Version it and date it
Prune the stale lines on a cadence. A starter is in the guide’s Appendix B.

More context is not better
Past a point, a stuffed window dilutes attention. Include what matters, at the right level.

WHERE THE DATA GOES

“What can I put in?” is the wrong question. Three right ones, answered once.

1	2	3
Which platform?	**How is it configured?** Consumer, team, enterprise with a data agreement, no retention.	**What does your policy say?** For each category, on that platform.
Fine almost anywhere General scenarios, anonymized examples, hypotheticals that map to no real person, holding, or deal.	**Depends on the platform** Specifics about a holding, a counterparty, a family member, a draft that names real parties.	**Almost never** Live credentials. Anything you’re contractually barred from sharing. Anything a regulator carved out by name.

Ask for the reasoning. Keep notes on what you accepted and changed.

HOW MUCH TO TRUST IT WITH A TASK

Two questions decide it.

REACH

If it goes wrong, how far does the damage spread?

Just me, my team, a client, the public

REVERSIBILITY

How easily can it be undone?

Thirty seconds, or a week of apology letters

Small and reversible: let it run.

Large or permanent: a person signs off, every time.

KEEPING IT HONEST

Context decays. The maintenance is light if it’s regular.

WHEN YOU NOTICE

Overriding the context mid-task (“ignore my settings, this time…”) is the signal. Make a note then.

WEEKLY, FIFTEEN MINUTES

Fix the easy ones. Retire the dead ones.

QUARTERLY

Read your profile as if you were new to it. Would it produce the right behavior for someone who didn’t know you?

At the end of any good session, paste this:

“Review this whole conversation. Find anything I said or did that reflects a durable preference, default, or standing instruction. For each one, propose a single line I could add to my personal context, phrased as a standing rule. Flag any that are too situational. Ask before assuming. Keep the list short.”

AFTER THE ROOM

The screen is a skill. The deal process is a workflow.

CONTEXT

Who it works for

The standing profile. How we invest, phrased as rules.

SKILL

One job, the same way every time

Screen a teaser: inputs, steps, what done looks like. Anyone in the office can run it.

WORKFLOW

Skills in sequence, people at the checkpoints

Screen. Pull comparables. Draft the memo. Prep the call. A person decides at each gate.

Build in that order. Agents come after, with their own safeguards.

QUICK REFERENCE

The whole guide on one page.

Idea	The short version
Five briefing elements	Role · Context · Task · Constraints · Quality. Skip one and the model guesses.
Three registers	Discovery (explore) · Production (execute) · Verification (challenge). Most people only use the middle one.
Three framing moves	Not so fast (“Interview me first.”) · Two points of view (“Argue both sides.”) · The hard read (“A colleague drafted this. What’s weak?”)
The one line	The prompt is the assignment. The context is the room.
Four tiers	Personal · Organizational · Project · Task. Sort by “how often is this true?” Write it once at the right level.
The data chain	Which platform · how configured · what the policy says.
Trust	How far does the damage spread, and how easily is it undone?
After the room	A skill is one job, the same way every time. A workflow chains skills with a person at the checkpoints.

THE MONDAY CHALLENGE

Don't leave with twenty ideas. Pick one workflow.

1. Explore

"Interview me first. What am I missing? What am I assuming?"

2. Brief it

Role, context, task, constraints, quality.

3. Challenge it

"Assume I want the hard read. What's weak, wrong, or unsupported?"

4. Write it down

If it works, save it, so it stops living only in your head.

Prompt like a pro. Build the room. Then the skills. Then the workflows.

The long versions of this guide, the Prompting Primer and the Context Primer, are available on request.

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