

Building your Custom GPT.

Every click. Every field. Every time.

Use this to build your Research Engine inside your own ChatGPT account

Time to complete about 10 minutes, following the steps in order

Companion to the Session 1 Prospect Research Playbook

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How to use this guide

Tim, this is the walk-through. Not the high-points tour. Every click, every button name, every field in order. If you've never built a Custom GPT before, follow this line by line and you'll have a working Research Engine inside your ChatGPT account in about 10 minutes. We'll do it together on the call, and then this guide is yours for any time you want to rebuild, tune, or show someone else how it works.

The guide is broken into seven Parts. Parts A, B, and C are the build. Part D is a live test. Parts E, F, and G are how you'll use it, tune it, and troubleshoot.

Before you start

You should have:

- **A ChatGPT Plus, Team, or Enterprise subscription.** Custom GPTs are not on the free tier. If you're on free, upgrade at chatgpt.com/subscribe first — it's \$20/month.
- **A browser.** Chrome or Safari both work. I'd suggest NOT using Edge or Firefox for this first build — some of the GPT editor interactions get glitchy in them.
- **This document open in another tab or printed** so you can follow step by step.
- **Two companion files from me**, sitting in the same folder as this document:
 - `GPT-INSTRUCTIONS.txt` — the instructions you'll paste into your GPT. Open it in TextEdit, select all, copy.
 - `GPT-STARTERS.txt` — the four conversation-starter prompts, one per line.

Part A • Get yourself to the GPT Builder

Step 1. Sign in to ChatGPT.

Open chatgpt.com in your browser. If you're already signed in, skip to Step 2.

If you're not signed in: click **Log in** in the top right. Enter your email and password (the same ones you already use for ChatGPT).

Step 2. Open the GPT editor.

You have two ways to get there. Pick whichever feels easier:

Way A (click path): 1. Look at the left sidebar of ChatGPT. 2. Near the top, find the entry that says **GPTs** (sometimes shown as a grid icon with the word "GPTs" next to it). 3. Click it. You'll land on a page titled "GPTs" with a search bar and some featured GPTs below it. 4. In the top-right of that page, find the button that says **+ Create**. Click it.

Way B (direct URL): 1. In your browser's address bar, type: `chatgpt.com/gpts/editor` 2. Press Enter. You'll land directly in the editor.

Either way, you should now see a page with two panels:

- **Left panel:** a chat that says something like "Hi! I'll help you build a new GPT." This is the conversational builder. **We're going to ignore it.**
- **Right panel:** a preview of the GPT you're about to build. Empty right now.
- **Top of the left panel:** two small tabs — **Create** and **Configure**.

Step 3. Click the "Configure" tab.

This is the most important click of this entire guide. **Do not use the Create tab.** That one tries to build your GPT by chatting with you, and it will fight you on the specificity we need.

Click **Configure**. The left panel will change from a chat to a form with fields like "Name," "Description," "Instructions," and so on. That's where we're working.

Part B • Fill in the Configure form

The Configure tab is one long form, top to bottom. Fill each field in order. Don't skip around.

Step 4. (Optional) Upload a profile picture.

At the very top, there's a circle with a camera icon — a profile photo for your GPT. You can click it and upload any image, or let ChatGPT auto-generate one (it'll offer). Or skip entirely. This is cosmetic.

If you want, upload your Vistage headshot or the Local Nerds logo from Reu. Otherwise, leave it as the default.

Step 5. Enter the Name.

Click in the **Name** field and type **exactly**:

```
Tim's Prospect Research Engine
```

That's what you'll see in your GPT sidebar later. You can change it any time.

Step 6. Enter the Description.

Click in the **Description** field. Type (or paste):

```
Researches CEO candidates for my Vistage groups against my criteria – private, never fabricates, writes hooks in my voice.
```

This is the one-liner that shows under the name. It's not shown to anyone else (your GPT is private), it's just for you.

Step 7. Paste the Instructions.

This is the big one. The **Instructions** field is the “brain” of the GPT — everything it knows about how to do its job lives here.

1. Open the file `GPT-INSTRUCTIONS.txt` (it sits next to this document in the same folder Reu gave you).
2. Press `Cmd + A` to select the entire document.
3. Press `Cmd + C` to copy.
4. Come back to ChatGPT.
5. Click inside the **Instructions** text box.
6. Press `Cmd + U` to paste.

The text box should now have about 70–80 lines of instructions, starting with *“You are a research assistant helping Tim Cole...”* and ending with *“...Tim’s building this with you, not using a product.”*

Double-check: scroll through what you pasted. Make sure nothing got cut off at the top or bottom. If it looks right, move on.

Step 8. Add the Conversation Starters.

Below Instructions, find the **Conversation starters** section. You’ll see four rows with plus-signs and text fields.

1. Open the file `GPT-STARTERS.txt`.
2. You’ll see four lines in that file. Each one is a different conversation starter.
3. Copy the first line (the whole thing, including any punctuation).
4. Paste it into the first Conversation starter field in ChatGPT.
5. Copy the second line. Paste into the second field.
6. Repeat for the third and fourth lines.

If any of the four rows has old placeholder text, click the X next to that row to remove it first, then paste.

You should end up with four conversation starters filled in. These will show up as clickable suggestion buttons whenever you open the GPT in a new chat.

Step 9. Leave “Knowledge” empty for now.

Below Conversation starters is a section called **Knowledge**. This is where you’d upload reference files (like your 8-step email cadence or a sample spreadsheet) that the GPT reads on every turn.

Leave this empty for now. We’ll add files together in Session 2 once we see how the GPT performs without them. Adding files too early can actually make the GPT worse because it tries to use everything.

Step 10. Set the Capabilities.

Scroll down to the **Capabilities** section. You’ll see four checkboxes:

- **Web Search** → **CHECK THIS**. This is how your GPT pulls LinkedIn profiles and recent news. Without it, the GPT can only use its training data, which doesn’t include recent posts.
- **Canvas** → Leave unchecked. Not useful here.
- **DALL-E Image Generation** → Leave unchecked. No images needed.
- **Code Interpreter & Data Analysis** → Leave unchecked. No spreadsheets to crunch, no charts to make. We don’t want the GPT spending compute on this.

Double-check: only Web Search should have a checkmark.

Step 11. Skip “Actions.”

Below Capabilities is a section called **Actions** with a button that says “Create new action.” **Do not click this.** Actions are for wiring your GPT up to external APIs — way more advanced than we need today. Ignore it completely.

Step 12. Skip “Additional Settings.”

Further down may be a section labeled **Additional Settings** with a toggle for “Use conversation data in your GPT to improve our models.” If it’s there and checked, uncheck it — this keeps your prospect research out of OpenAI’s training data. (Not every account has this toggle; if you don’t see it, don’t worry about it.)

Part C • Save and set visibility

Step 13. Click the green “Create” button.

Look at the **top right** of the screen. There’s a button that says **Create**, with a small down-arrow next to it.

1. Click the **down-arrow** first (not the button itself). A menu drops down with visibility options:
 - **Only me** ← pick this one
 - Anyone with the link
 - GPT Store
2. Click **Only me**. The button text will change to reflect your selection (it may now say “Create (Only me)” or similar).
3. Now click the **Create** button itself.

The page will briefly show a saving indicator, then give you a confirmation screen. You’ve just built your Custom GPT.

Step 14. Click “View GPT” or “Start a new chat.”

The confirmation screen will offer a link to open the GPT you just built. Click it. You’ll land in a fresh chat with your Research Engine.

You’ll know it worked if:

- The chat header says **“Tim’s Prospect Research Engine.”**
- The four Conversation starter buttons you entered are visible above the message box.
- The message box placeholder says something like *“Message Tim’s Prospect Research Engine...”*

Part D • Test it with one real name

Before you close this tab, test the GPT on one name so you know the setup is good.

Step 15. Paste a test candidate.

In the message box, type (or paste) a real name of someone you're curious about. A good first test is one of the ten prospects already in your pipeline — since you know what the “right answer” looks like. Try:

```
Research this person for my Vistage group: Marco Antonio Abarca, CEO of Ready Foods in Denver.
```

Press Enter.

Step 16. Watch what the GPT does.

You should see the GPT say something like *“Searching the web...”* and start looking up Marco. This takes 20–60 seconds depending on how deep the search goes.

When it's done, the GPT should return a research card in the format you saw in Session 1: - Title, Company, Industry, Revenue band - LinkedIn URL - Recent signal - Three Intrigue Hook variants - Why they fit - Flags

Compare what it returned to the Marco Abarca entry in your pipeline spreadsheet. The hooks may be worded slightly differently — that's expected; there's natural variance. The key question: **does it sound like something you'd actually write?**

Step 17. Try a second name.

For a harder test, try a name the GPT couldn't possibly have in its training data — someone who made the news in the last couple of months. For example:

```
Research this person for my Vistage group: [someone whose name came up in this week's DB].
```

If the GPT does the web search, pulls real signal, and returns a defensible card, you've got a working Research Engine.

If something looks off — the hooks feel generic, the revenue band is wildly wrong, a LinkedIn URL looks invented — tell me in the chat (you can talk TO the GPT about what it got wrong) and/or flag it for our Session 2 tune-up.

Step 18. Open the GPT from the sidebar.

Close the current tab. Go back to your main ChatGPT window.

Look at the **left sidebar**. At the top, you should see a section that starts with pinned GPTs or recent GPTs. Your new GPT should appear in there, labeled **"Tim's Prospect Research Engine."**

Click it once to pin it. (Some versions of the UI auto-pin; some don't.) Now it's always one click away.

Part E • The weekly rhythm

Here's how I'd suggest you use it starting this week:

Monday morning (15 min). Open the GPT. Paste in the 5 names you want to work this week. Use them one at a time — not all at once; the GPT handles singles better than batches. Copy the hook you like from each card into your pipeline spreadsheet (Intrigue Hook column).

Tuesday (10 min). Review what the GPT gave you. Any card where the hook felt flat? Note it on paper. You'll tell me in Session 2, and we'll tune the instructions together.

Wednesday (actual outreach). Send your Step 1 cadence with the hooks you selected. The GPT's job is done by now; this is you.

Thursday (optional — 10 min). Try the GPT on two names you DON'T already know anything about. See how much of the work it does for you. This is the calibration moment.

Friday. Reply to my session recap email with what worked, what didn't, and one thing you'd change about the instructions. That's Session 2's homework.

Part F • Editing the Instructions later

The whole system's power is that you can change its brain in 10 seconds.

1. Open ChatGPT, click your Custom GPT in the sidebar.
2. Click the GPT's name at the top of the chat.
3. In the menu that appears, click **Edit GPT**.
4. You're back in the Configure form. Change anything you want. Hit **Update** (top right).

Common tuning moments:

- **The hook sounds too salesy for an industry.** Scroll to the Hook voice rules in Instructions. Add a line like "For [industry], lean toward understated — avoid any language about growth or success metrics."
- **The GPT keeps missing a criterion.** Scroll to the six-point filter. Make the criterion sharper or add an example.
- **You added a seventh criterion.** Add it to the filter list.
- **You want the card shorter.** Edit the format section to drop any field you don't use.

Every edit takes effect immediately, for every new chat. Old chats keep their old instructions.

Part G • When things go sideways

“The GPT fabricated a LinkedIn URL / phone number / revenue number.”

This is the most serious failure mode and the one the Instructions specifically try to prevent. If it happens:

1. In the chat, tell the GPT: *“You fabricated [X]. Don’t do that. Check your instructions on honesty.”* It will usually apologize and restate what it actually knows.
2. Open Edit GPT → Instructions → find the “Honesty rules” section → make it sharper. Add the specific thing it got wrong as a forbidden example.

“The web search returned nothing useful / the GPT said ‘I don’t have info on this person.’”

Three possible causes:

1. **Web Search isn’t enabled.** Go back to Edit GPT → Capabilities → make sure “Web Search” is checked.
2. **The name is too generic.** “John Smith in Denver” won’t work. Give the GPT a company or LinkedIn URL.
3. **The person really doesn’t have a public presence.** That’s useful information — probably not a great Vistage prospect if they have zero digital footprint.

“The GPT changed the hook format / stopped saying ‘intrigued by your X.’”

It drifted. Open Edit GPT → Instructions → find the “Hook voice rules” section → add at the top: *“This format is non-negotiable: ‘intrigued by your [X] and business leadership’. Never deviate.”*
Redeploy (hit Update).

“I accidentally deleted my GPT.”

Don’t panic. In ChatGPT:

1. Go to chatgpt.com/gpts/mine (your GPTs page).
2. If you can find the deleted one in “Recently deleted” (there might be a tab), restore it.

3. If not, you still have the Instructions, the conversation starters, and this guide — rebuild from scratch in about 5 minutes.

If you get stuck on any step – STOP and email me.

Don't fight it. I'd rather unblock you in 30 seconds on a quick email than have you sit on a frustrating bug for 20 minutes. reu@localnerds.co.

That's the whole walkthrough. Once you've done this one, the second GPT you build will take 3 minutes. The third will take 2. The hundredth will feel like tying your shoes.