AI as a Thinking Partner

A Practical Setup Guide for When Everything Needs Your Attention

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How to use this guide

This guide is designed to be **used alongside your work**, not read cover to cover.

You can: - Copy–paste sections directly into ChatGPT, Claude, or Copilot - Adapt the language to match your voice - Use only the parts that are helpful right now

About projects: Most AI tools let you create a *project*, *workspace*, or *folder* where instructions and documents live together. Create one new project for this setup, upload the PDFs mentioned here, and use it whenever you want AI to remember how you work.

How to create a project (quick steps)

You only need to do this once.

1. Open your AI tool (ChatGPT, Claude, or Copilot).
2. Look for **Projects**, **Workspaces**, or **Folders** in the sidebar or menu.
3. Click **Create new** (or similar).
4. Name it something like **"Thinking Partner – My Work"**.
5. Upload the documents from this guide (Clinical Voice Profile, Guardrails, Working Knowledge Sheet).
6. Add the project-level instructions where your tool allows it.
7. Start new chats *inside this project* when you want AI to remember how you work.

If your tool doesn't support projects yet, you can still use this guide by pasting the prompts at the start of each chat.

Nothing here requires advanced setup, technical knowledge, or sharing sensitive data.

The Core Idea

AI is most useful **before** it starts generating answers.

Used well, it acts as a **thinking partner** that helps you: - Slow down when everything feels urgent - Organize what you already know - Decide what deserves your attention first

This guide walks you through the exact setup demonstrated in the session.

The Thinking Partner Framework (At a Glance)

You will move through these steps **one at a time**:

1. Name the thinking task
2. Set how you want help
3. Set guardrails
4. Bring in what already exists
5. Reflect, organize, and decide

You don't need to do all five every time.

STEP 1 — Name the Thinking Task

When to use this

- You feel overwhelmed or stuck
- You know what needs to happen but can't start
- Everything feels equally important

Guiding question

"What am I trying to think through right now?"

Chat-Starter Prompt (Copy–Paste)

```
Before offering any suggestions, ask me the key questions you need in order
to act as a thinking partner.
Focus on clarifying:
– what I'm trying to think through
– any constraints or non-negotiables
– what a 'useful outcome' would look like

Ask one question at a time.
Do not generate solutions until I respond.
```

Example (keep it short)

> "I'm trying to figure out how to organize AAC vocabulary decisions across students without redoing work I've already done."

Tip: At this stage, clarity matters more than completeness.

STEP 2 — Set How You Want Help

Where this lives

Project-level instructions (reusable across chats)
This is something you set once and reuse. It should stay consistent unless *you* change how you think or work.

Why this matters

If you don't tell AI how to think with you, it will guess — often in ways that don't match your voice, values, or judgment.

This step helps AI sound more like *you* and less generic.

Guiding question

"How do I want this to think and respond when it helps me?"

Create Your Clinical Voice Profile (One-Time Setup)

What this is

Instead of answering these questions over and over, you can turn your preferences into a **Clinical Voice Profile** — a short document that captures how you think, decide, and communicate.

This profile can be: - Generated once - Saved as a PDF or document - Uploaded to your AI project - Edited anytime as your thinking evolves

Think of it as a snapshot of *how you work*, not what you're working on.

Step A — Reflect on your preferences

(Do this once; you can revise later)

You don't need to answer everything perfectly. Pick what feels closest.

1. When I'm thinking through work, I usually prefer:
☐ Clear, concise bullets
☐ Brief explanations with examples
☐ More narrative, reflective responses

2. When offering ideas, I want:
☐ A few safe, practical options

☐ A mix of practical and creative ideas
☐ To be gently challenged sometimes

3. My default tone is usually:
☐ Straightforward and functional
☐ Warm and collaborative
☐ Plain-language / audience-friendly

4. When something requires judgment, I want AI to:
☐ Flag it clearly and pause
☐ Offer considerations, then stop
☐ Ask me before going further

5. Things that matter a lot to me in my work:

Step B — Generate your Clinical Voice Profile

Use this prompt once to turn your answers into a short profile document.

Profile-Generation Prompt (Copy–Paste)

```
Using my answers below, create a **Clinical Voice Profile** that summarizes:
- How I prefer to think through problems
- How I want ideas presented
- How I want judgment and uncertainty handled
- What values or priorities I want respected

Write this as a short, clear reference document I can reuse.
Do not include any task-specific or student-specific details.
```

Paste your answers below the prompt.

Step C — Save & upload the profile

- Save the generated profile as a PDF or document
- Upload it to your AI project
- Review and edit the language so it truly sounds like you

This profile becomes **project-level context** that AI can refer to across chats.

Tell AI How to Use the Profile (Project-Level Instruction)

Add this instruction to your project-level settings:

Project-Level Instruction (Copy–Paste)

```
Refer to the uploaded **Clinical Voice Profile** when responding.
Use it to:
- Match my tone and communication style
- Decide how much explanation to provide
- Know when to pause and ask for my judgment

If something conflicts with the profile, ask me before proceeding.
```

Important reminder

This profile is not permanent.

You can update it whenever your priorities, role, or working style changes.

Think of it as a living reference — not a rulebook.

Turn Your Answers into Project-Level Instructions

Once you've reflected on the questions above, summarize them in a few sentences like this:

Project-Level Prompt (Copy–Paste)

> When you respond, please: – Match my tone (clear and practical, not overly verbose) – Offer multiple options instead of one "best" answer – Flag where professional judgment is required and pause – Prefer functional, real-world examples over theory

You can add or remove lines over time as your needs change.

Important reminder

This step is **not** about being precise or perfect.

It's about reducing friction so you don't have to keep correcting the tone or direction in every new chat.

STEP 3 — Set the Guardrails

Where this lives

Project-level reference (reusable across chats)
Like your Clinical Voice Profile, guardrails are something you define once and reuse.

Why this matters

Guardrails protect: - your professional judgment - student privacy - your comfort and trust when using AI

They make expectations explicit so AI doesn't have to guess.

Guiding question

"What should this never do — even if I ask?"

Create Your Guardrails Document (One-Time Setup)

What this is

A short **Guardrails Document** that clearly states boundaries for AI use.

This document: - is written by you - reflects your ethical and practical limits - can be saved as a PDF - lives at the project level

Think of it as your *non-negotiables* in writing.

Step A — Reflect on boundaries

Consider prompts like: - What decisions must always stay mine? - What information should never be included? - What kinds of outputs make me uncomfortable?

Step B — Generate your Guardrails Document

Guardrails-Generation Prompt (Copy–Paste)

```
Help me create a **Guardrails for AI Use** document that clearly states:
– What types of decisions I will always make myself
– What information should never be requested or used
– How uncertainty or risk should be handled

Write this as a short, clear reference document.
Do not include any task-specific or student-specific details.
```

Step C — Save & upload the guardrails

- Save the guardrails as a PDF or document
- Upload it to your AI project

• Review and edit the language so it reflects your comfort level

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Tell AI How to Use the Guardrails (Project-Level Instruction)

Add this instruction to your project-level settings:

```
Always follow the uploaded **Guardrails Document**.
If a request would violate these guardrails, stop and tell me why.
When in doubt, ask before proceeding.
```

STEP 4 — Bring in What Already Exists

Where this lives

Project-level reference (living document)
This information is meant to grow over time and be reused.

Why this matters

Much of your expertise already exists — it's just scattered.

Capturing it once means you don't have to keep re-deciding or re-explaining it.

What this looks like in practice

Create a simple **Working Knowledge Sheet** (document or spreadsheet) that includes:

A. Core patterns that stay consistent - Defaults you usually start from - Principles you rarely change

B. Decision logic you reuse - What makes you adapt - What makes you pause or simplify

C. Light, optional student-specific notes - Written generically (no names or identifiers) - Focused on *why* something changed, not who

Example:

– Core vocabulary stays consistent; access method changes – Field size reduced when cognitive load increases

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How to use this with AI

Upload the Working Knowledge Sheet to your project.

Then use prompts like:

```
Refer to the uploaded Working Knowledge Sheet.
Help me identify patterns, overlaps, or repeated decisions.
Do not suggest changes yet.
```

STEP 5 — Reflect, Organize, Decide

Where this lives

Chat / thread-level interaction
This step happens in the moment, for the task at hand.

Why this matters

This is where all the setup pays off.

Because voice, guardrails, and knowledge are already in place, AI can focus on helping you think — not guess.

Guiding question

"What stands out, and what's the next best step *right now*?"

Prompt (Copy–Paste)

```
Using the uploaded Clinical Voice Profile, Guardrails Document, and Working
Knowledge Sheet:
- Reflect back what's already working
- Organize related ideas or decisions
- Suggest a small number of possible next steps

I will decide what to act on.
```

A Simple Habit That Makes This Work

Start every new chat with **Step 1**.

If the conversation gets messy, pause and restate:

"Let's go back to what I'm trying to think through."

A Final Note on Safety

• Do not upload student records, layouts, or identifying details
• Use summaries and decision notes instead
• If it wouldn't go in an email, don't put it in a chat

This system is designed so the safest choice is also the easiest.

You don't need to hold all of this in your head anymore.

Use this guide as often — or as lightly — as you need.