Create and Run a Custom GPT

Two Beginner-Friendly Walkthroughs Using the Lead Response Assistant Example

Walkthrough 1	Create a Custom GPT step by step
Walkthrough 2	Open, run, review, and reuse your Custom GPT

Example GPT

Lead Response Assistant

Purpose: Review new customer inquiries, organize the important details, identify missing information, and draft a warm, professional response for the business owner's approval.

> Privacy reminder: Never enter passwords, banking details, tax identification numbers, private client records, protected health information, or confidential financial information into a public AI tool.

Walkthrough 1: Create a Custom GPT

Creating the GPT gives it a clear job, saved instructions, approved knowledge, boundaries, and example prompts.

1 Open ChatGPT and go to GPTs

Open ChatGPT in a web browser and sign in.

Click **GPTs** in the left navigation menu.

Click **Create** in the upper-right corner to open the GPT Builder.

Presentation wording: Open ChatGPT, click GPTs, and then click Create.

2 Choose one clear job

Choose one repeatable business task instead of trying to make one GPT handle your entire business.

- Lead responses
- Website copy
- Email replies
- Meeting recaps
- FAQs
- Content planning

For this walkthrough, the GPT's one job is reviewing new customer inquiries.

3 Add the name

Type a name that clearly describes the job.

Example name: Lead Response Assistant

Avoid broad names such as Business Helper.

4 Add the description

Write one or two sentences that explain what the GPT does.

Paste this description:
Reviews new customer inquiries, organizes the important details, and drafts a warm, professional response for the business owner's approval.

5 Write the instructions

The instructions tell the GPT what to do, how to respond, what tone to use, and what it must not do.

Paste these instructions:

> You are a lead-response assistant for a small service-based business. Review each new inquiry and identify the service requested, the customer's main need, and any missing information. Draft a warm, professional, and concise response. Invite the person to schedule a consultation using the approved scheduling link. Do not promise pricing, results, availability, or a final decision. Present every response as a draft for the business owner to review before sending.

6 Add conversation starters

Conversation starters are short, clickable example prompts that show the user how to begin.

- Review this new customer inquiry.
- Organize the lead details and identify the service requested.
- Draft a warm, professional response for my approval.
- Identify any missing information I should ask for.
- Summarize this inquiry and recommend the next step.

Enter one starter per box.

7 Add knowledge files, if needed

Knowledge is optional. Upload only approved information the GPT may safely reference.

- Service descriptions
- Frequently asked questions
- Brand voice guidance
- General policies
- Approved templates
- Scheduling information

For a live demonstration, you may leave Knowledge empty and test the instructions first.

Do not upload private customer inquiries, passwords, banking information, confidential contracts, or sensitive records.

8 Choose capabilities

Turn on only the capabilities the GPT needs.

For the Lead Response Assistant, leave Web Search, Image Generation, and Data Analysis off unless you have a specific business reason to use them.

Do not create an Action for this beginner demonstration.

> **Simpler is better.**

9 Test the GPT in Preview

Use a realistic sample inquiry in the Preview panel.

Paste this test:

> A potential client is interested in a website redesign and SEO. They want a clearer website and stronger online visibility, but they did not provide their current website address, budget, timeline, or specific goals. Review the inquiry, organize the important details, identify what information is missing, and draft a warm, professional response for my approval.

- Did it identify website redesign and SEO?
- Did it list the missing website address, budget, timeline, and goals?
- Did it avoid inventing prices, guarantees, availability, or links?
- Did it present the response as a draft for approval?

10 Save the GPT

Click **Create** or **Save**, depending on the wording shown in your interface.

For the first version, choose **Only me** while you continue testing.

You can update the name, instructions, knowledge, capabilities, and sharing settings later.

> **Creating the GPT saves the job and rules.**

Walkthrough 2: Run and Use Your Custom GPT

Running the GPT means opening it, giving it a current task, reviewing the response, and using the approved result.

1 Open your Custom GPT

Open ChatGPT.

Go to **GPTs** or **My GPTs**.

Select **Lead Response Assistant**.

> **You may also reopen it from a direct link or previous conversation.**

2 Choose a starter or type a request

Click a conversation starter such as **Review this new customer inquiry**, or type your own request.

A starter begins the conversation. It does not replace the current inquiry details.

3 Add the current details

Paste or type the information needed for this specific task.

Use non-sensitive information only.

Example inquiry:

> A potential client is interested in a website redesign and SEO. They want a clearer website and stronger online visibility, but they did not provide their current website address, budget, timeline, or specific goals. Review the inquiry, organize the important details, identify what information is missing, and draft a warm, professional response for my approval.

4 Review the response

Check the draft before you use it.

- Requested service
- Main need
- Missing information
- Accuracy
- Tone
- Privacy

- Next step

Make sure the GPT did not invent prices, availability, guarantees, names, dates, or links.

The GPT gives you a draft. You provide judgment and final approval.

5 Ask for changes

Continue the conversation until the response fits your business.

- Make the response shorter and warmer.
- Add a clearer next step.
- Remove anything that sounds like a guarantee.
- Turn this into an email with a subject line.
- Ask only the three most important follow-up questions.

Using a Custom GPT is still a conversation.

6 Use the approved result

After reviewing and approving the draft, place it in the correct business tool.

- Copy the email into Gmail
- Save the lead summary in your CRM
- Add next steps to your project system
- Use approved website or FAQ copy

Unless you intentionally connect apps or actions, the GPT prepares the work inside ChatGPT.

7 Return and use it again

Open the same GPT whenever you have another lead-response task.

For each new inquiry, provide the current details, review the response, request changes, and use the approved result.

A new conversation may need the relevant context again.

Build it once. Use it repeatedly. Improve it as you go.

8 Improve the GPT over time

If the GPT repeatedly misses the same requirement, update the main instructions instead of correcting it manually every time.

Go to your GPT, select Edit, update the instructions or knowledge, test again in Preview, and save the changes.

Repeated problem = improve the GPT. One-time problem = revise the current conversation.

Creating the GPT	Gives it the job, instructions, knowledge, boundaries, and starters.
Running the GPT	Means opening it, giving it a real task, reviewing the response, and using the approved result.

HRichnetworks can guide you in identifying the right use case, writing instructions, organizing approved knowledge, testing the GPT, and deciding whether your business needs a Custom GPT, workflow, automation, or more advanced solution.

Walkthrough 3: Automate Different Potential-Client Inquiries

A Custom GPT waits for you to open it and provide a task. To make lead responses automatic, connect AI to a workflow that starts when a new inquiry arrives.

Recommended safe workflow: New inquiry -> AI prepares a draft -> You review -> You send

Recommended Setup for HRichnetworks (example of integrated tools)

Because HRichnetworks already uses HubSpot, the best starting point is a HubSpot website form connected to an AI-assisted draft workflow.

- A potential client completes the website inquiry form.
- HubSpot creates or updates the contact record.
- A workflow starts when the form is submitted.
- The inquiry details are passed to AI.
- AI identifies the requested service, summarizes the need, and lists missing information.
- AI drafts a response for Helena's review.
- A Gmail or HubSpot draft is created.
- Helena reviews, personalizes, and sends the message.
- HubSpot creates a follow-up task if the lead does not respond.

Information the Inquiry Form Should Collect

- First and last name
- Email address
- Business name
- Current website address
- Service of interest
- Main business challenge
- Desired result
- Preferred timeline
- Estimated budget range
- How they heard about HRichnetworks
- Additional details

Why these fields matter

The more useful information the form collects, the less the AI has to guess. The workflow can also respond differently depending on the service selected.

Simple Routing Rules by Service

Service selected	AI should check or ask about
Website Design	Current website, website goals, required pages or features, timeline, and budget
SEO	Website address, target services, locations served, visibility concerns, and SEO goals
AI or ChatGPT Training	Number of participants, comfort level, business use cases, format, and preferred date
Automation or CRM	Current tools, manual process, delays, desired outcome, and who uses the system

Alternative Gmail Workflow (example of integrated tools)

A second option is to use an automation platform to watch Gmail and create draft replies.

> **New Gmail message -> Apply inquiry label -> Send details to AI -> Create Gmail draft -> Notify Helena -> Review and send**

Suggested Gmail Setup

- Create a Gmail label named Potential Client Inquiry.
- Create filters for website-form notifications or messages containing service-related terms.
- Use the labeled email as the workflow trigger.
- Pass the sender name, subject, and message body to AI.
- Have AI identify the service, summarize the need, list missing information, and draft a response.
- Save the response as a Gmail draft rather than sending automatically.
- Notify Helena that a draft is ready for review.

AI Instruction for the Automated Workflow

> You are the Lead Response Assistant for HRichnetworks, LLC. Review the potential client inquiry provided below. Identify the requested service, summarize the client's main need, and list any important information that is missing. Draft a warm, professional, concise email response for Helena Richardson's approval. Ask only the questions needed to determine the appropriate next step. Do not invent pricing, availability, guarantees, services, links, or client information. Do not promise that HRichnetworks can accept the project. Present the response as a draft and include a suggested subject line.

Pass the inquiry into the workflow using this structure

Potential client inquiry:
Name: [form or email name]
Business: [business name]
Service requested: [selected service]
Website: [website address]
Main challenge: [challenge]
Desired result: [desired result]
Timeline: [timeline]
Budget: [budget]
Additional message: [message]

What to Automate First - and What to Keep Manual

Automate first	Keep under human control
Capture the inquiry	Approve or reject the lead
Organize the details	Quote prices
Identify missing information	Promise availability or results
Draft the response	Send the final response
Create a follow-up task	Make financial or contractual decisions

Plain Presentation Wording

A Custom GPT responds when I open it. To make the process automatic, I connect AI to a workflow. When a new inquiry arrives, the workflow sends the details to AI, AI prepares a draft, and I review it before it is sent. The AI supports the process, but I remain the final decision-maker.

HRichnetworks Implementation Support

HRichnetworks can help map the inquiry process, improve the form questions, write the AI instructions, configure the workflow, create review steps, connect HubSpot or Gmail, test different inquiry types, and document the process for future use.

HRichnetworks LLC

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CRM • AI Training & Empowerment

- Custom Websites That Convert
- SEO & Digital Marketing That Get Results
- Automation & CRM That Save You Time
- AI & ChatGPT Training That Empowers You

Helena Richardson
FOUNDER & CEO / WEB STRATEGIST
Former NASA IT Specialist

WOMEN-OWNED Empowering Women Empowering Business BUSINESS

LET'S BUILD YOUR ONLINE SUCCESS STORY

804-394-5502
info@hrichnetworks.com
helenar@hrichnetworks.com
www(hrichnetworks.com
@hrichnetworks
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