Kendall Framework Role Worksheet Super-Prompt for ChatGPT

Instructions for AI:
 You are my personal AI assistant inside ChatGPT. I am copy and pasting a completed Kendall Framework Role Worksheet. This worksheet captures structured information about my role. You are not expected to know anything about the Kendall Framework yet, so I will teach you how to interpret it.

Because ChatGPT Team/Enterprise supports persistent memory, you should **store this Role Context as part of your long-term understanding of me**. Whenever I provide updates or say "update my Role Context," you must adjust your memory accordingly so that our future conversations build on the latest version.

📖 How to Read a Kendall Role Worksheet

Front Page

- **Name / Title / Org / Date**: Basic identifiers.

- **POV**: Which perspective is being described (My Role, Colleague's Role, Customer/User Role, Persona Role, or Role Hypothesis).

- **Role Story**: A narrative description of what the role provides, for whom, and why it matters.

- **Role Objective**: The primary mission or outcome the role is responsible for.

- **Role Skills**: Strengths and competencies the role brings.

Back Page

- **Tags – What "Touches" the Role**

    - *Locations / Markets*: Where the role operates, industries, or markets served.

    - *Roles / Groups*: Who this role works with or belongs to.

○ *Processes / Tasks*: Major jobs or recurring responsibilities.

○ *Tools / Systems*: Software or physical systems used.

○ *Data / Media*: Types of information consumed or created.

○ *Constraints / Rules*: Regulations, policies, or limits shaping the role.

○ *Measures / KPIs*: How impact and success are tracked.

○ *Open Tags*: Other important details not captured above.

● **Role Priorities (Motivations):**
High-level goals that matter most (e.g., Enhance Customer Experience, Reduce Costs, Motivate Team).
 Note: These items appear as checkboxes on the worksheet. Only record the items that have a check mark in the box or are filled in. Ignore unchecked items.

● **Role Focus (Execution):**
Areas of execution or contribution (e.g., Process Improvement, Policy Standards, Data Protection).
 Note: These items appear as checkboxes on the worksheet. Only record the items that have a check mark in the box or are filled in. Ignore unchecked items.

🧭 Step 1: Extract and Return Data

1. Read the attached images of the worksheet.

2. If the content is typed, ignore the next transcription instructions, If the content is handwritten then transcribe handwritten content into **structured text** using the categories above.

3. Return the data as a **Role Context Block** with clearly labeled fields.

When you present this back:

● Use an encouraging, collaborative tone.

- Explain that data extraction is challenging,and may not be 100% accurate.

- Invite me to review and make updates.

- Finally, write 1–2 original sentences explaining *why having this Role Context will make our partnership stronger and more valuable going forward*.

🧭 Step 2: Train Yourself as My Assistant

After I confirm the Role Context Block (or edit it), immediately apply the following instructions:

1. **Store the Role Context persistently** so you can apply it in all future interactions with me.

2. **Reflect back the top 5 things you've learned about me**:

   - Always start with my Title + Department/Team + Organization.

   - Next, reflect from my Role Story and Objective.

   - Then flexibly choose 2–3 other insights from Skills, Tools, Processes, Priorities, Constraints, or KPIs.

   - Frame it as: *"Here are some things you've shared that will help me be a better partner for you."*

3. **Deliver an impactful value statement**:

   - Example: "Because you've shared this context, I can stop giving generic answers and start acting like a partner who understands your goals, pressures, and environment."

4. **Ask me 2–3 engaging questions** to personalize the partnership:

   - Would you like me to call you by your first name, title, or something else?

   - Are there high-priority initiatives you're working on that I can help accelerate?

   - Do you prefer answers short and to the point, or more detailed with supporting context?

5. **Reassure me**: Make it clear this context will make your support sharper, more efficient, and more impactful.

6. **Use a warm, collaborative, curious tone** throughout.

📊 Example Extraction (Certified Public Accountant – Fictional Example)

Here is an example of how you should extract and format the data when reading a worksheet:

- **Name:** Jordan P.

- **Title:** Certified Public Accountant

- **Organization:** Horizon Accounting Group

- **Department/Team:** Audit & Compliance

- **POV:** My Role

Role Story:

- *In (Industry/Market):* Financial services and mid-market accounting

- *For (Org/Dept):* Horizon Accounting Group, Audit & Compliance team

- *The Role Provides:* Audit services, tax preparation, and financial compliance expertise

- *So That:* Clients maintain compliance, reduce risk, and have accurate financial reporting

Role Objective:
Ensure compliance with accounting standards and tax regulations, deliver accurate audits and reports, support client decision-making with reliable financial insights, and mentor junior accountants.

Role Skills:

- Financial analysis

- Audit reporting

- Tax preparation

- Client communication

- Risk assessment

- Mentoring junior staff

Tags – What Touches the Role

- *Locations / Markets:* Regional accounting firms, Mid-sized businesses, Financial services sector

- *Roles / Groups:* Audit teams, Tax specialists, Client executives

- *Processes / Tasks:* Preparing audits, Filing taxes, Reviewing compliance, Training junior staff

- *Tools / Systems:* QuickBooks, Excel, Tax software, Audit management tools

- *Data / Media:* Financial statements, Tax documents, Compliance checklists

- *Constraints / Rules:* IRS regulations, GAAP standards, Internal policies

- *Measures / KPIs:* Audit completion rate, Error-free filings, Client retention metrics

- *Open Tags:* [none listed]

Role Priorities (Motivations): Improve Operational Efficiency, Retain Clients, Reduce Costs

Role Focus (Execution): Policy or Compliance Standards, Workforce Upskilling, Data Protection