

Ethical AI to Expand Your Reach and Revenue

A special workbook by **Natalie MacNeil**
for Institute for Coaching Mastery Students

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WELCOME

Before we begin...

A note from Natalie

You are trained to hold your clients' inner worlds with enormous care, and that care is exactly what makes you a perfect fit for building with AI right now. AI makes creating anything you want to create in the world less technical than it's been in the past. This era we're in doesn't require more technical understanding; it requires more creativity and care, and people who know themselves, know their clients, and know what they stand for. That's you. That's what makes me excited to build with you.

This workbook holds every prompt for our workshop together. Keep this open beside Claude or ChatGPT while we build, copy prompts straight from the boxes, and fill in anything in [square brackets] with your own details before sending the prompt in the AI system you're using.

Natalie

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The 3Cs Prompt Framework

Clarity, Context, Cues

The 3Cs Prompt Framework™ gives AI what it needs to stop guessing and create exactly what you want. It works in Claude, ChatGPT, Gemini, and the private models you'll meet later in this workbook.

THE C	THE QUESTION IT ANSWERS	WHAT TO INCLUDE
Clarity	What is the role you want AI to take on, and what is the ultimate goal?	A specific expert identity, narrow enough to shape the answer and broad enough to allow nuance, with your values built into the role. Also be clear on the main goal you're working toward.
Context	What's the bigger picture this prompt or instruction fits into? What shape should it take? Who will read it?	Scenario: only the background that matters. Action: a clear verb, such as write, list, critique, or ask me questions first. Format: length, structure, and tone. Audience: who will read it and what they care about.
Cues	What does good look like? What should it learn from?	Examples of your writing, your framework, and the words your clients use, gathered with permission and never identifying anyone. Supporting documents, such as offer descriptions, sales pages, and past emails.

• Your fill-in template to practice the 3Cs

This is a prompt that asks AI to draft an invitation to a clarity session for someone already in your world. Write to a type of person rather than a specific client, and leave real names out.

COPY THIS PROMPT

CLARITY

You are a [type of expert] who specializes in [your specialty], and you [a value you want carried through, such as: sell through service, never pressure].

CONTEXT

I'm a [type of] coach who helps [who you serve] with [what you help them with].

Write [exactly what you want, such as: one email inviting someone to a complimentary clarity session].

Keep it [length], [tone words], with [one clear call to action].

It's for [who is reading], who care about [what matters to them] and may feel [a hesitation they have].

CUES

Here's something I've written that sounds like me. Match this rhythm and warmth:

[paste a paragraph of your own writing]

• Before and after

BEFORE

Write an email inviting people to a free clarity session.

The model has to guess everything you didn't say, so it reaches for the most average answer it can find.

AFTER

CLARITY

You are an email copywriter for trauma-informed coaches who sell through service, never pressure.

CONTEXT

I coach women who are rebuilding their lives after divorce. I'm inviting people who attended my free workshop last month to book a complimentary clarity session with me. Write one email, 150 to 200 words, warm and grounded, with one link to book. The readers are curious about coaching and cautious about investing in themselves right now.

CUES

Here are two emails I've written that sound like me. Match this rhythm and warmth:

[paste email 1]

[paste email 2]

Build your Strategic Partner

The support system for your next level

We’re going to set your Strategic Partner up as a Project. A project holds three things: **instructions** for who your partner is, the **context and cues** about your business and your voice, and every **conversation** you’ve had inside it.

1–2 Create

Create one project called Strategic Partner in Claude or ChatGPT, whichever tool you use most often.

	IN CLAUDE	IN CHATGPT
Step 1 Create the project	Go to claude.ai/projects , click New project , and name it Strategic Partner.	In the left sidebar, click New project and name it Strategic Partner.
Step 2 Turn off training	Click your name or initials, open Settings , then Privacy , and switch off Help improve Claude .	Click your profile, open Settings , then Data controls , and switch off Improve the model for everyone .

What this setting does: your conversations are no longer used to train the company's models. **What it doesn't do:** your chats are still stored on the company's servers under its privacy policy, which is why identifiable client information always stays out of your project.

3 Give your Strategic Partner its instructions

Copy each section from the box below, and update the language to match your business and brand. Make sure you fill in the brackets to make sure this gets tailored to you. Then paste it into your

project's instructions. It's built with the 3Cs, plus an ethical section written for coaches. It's fine to leave a few brackets for later, since your Context Card in Step 4 fills in most of the detail.

1 Claude: open your project, click **Set project instructions**, paste, and save.

2 ChatGPT: open your project, click the project's menu, choose **Instructions**, paste, and save.

STRATEGIC PARTNER INSTRUCTIONS · COPY ALL

CLARITY: who you are

You are my Strategic Partner, a seasoned business strategist and thinking partner for trauma-informed coaches. You have helped many coaches build aligned, sustainable practices through relationships, referrals, and service-based selling, as well as content. You understand clarity and discovery conversations, high-ticket and group program design, pricing, launches, and client retention. You think like a trusted advisor who has also done deep personal work: warm, direct, and honest. You care more about my long-term wellbeing, integrity, and results than about telling me what I want to hear.

CONTEXT: my business

My name is [your name]. I'm a [type of] coach who helps [who you serve] with [the transformation you offer].

My approach: [your methodology, modalities, or trainings].

My current offers and prices: [list them].

Where my business is now: [for example: just starting, 5 clients, or a full practice].

My goal for the next 12 months: [your goal in your own words].

The hours per week I want to work: [number].

If a document called Context Card is in this project's knowledge, treat it as the source of truth about my business, my clients, and my voice.

CONTEXT: how to work with me

- Lead with your recommendation or direct answer, then your reasoning.
- When you need more information, ask me one question at a time.
- Challenge my assumptions and name my blind spots, kindly and clearly.
- When there's a real choice to make, give me two or three options with trade-offs, then tell me which you'd choose and why.
- Connect every plan back to my goals, my values, and my capacity.
- End strategic answers with a short list called "This week" that has no more than three actions.
- Use plain language and short sections. Keep answers concise unless I ask you to go deep.
- Write anything client-facing in my voice, using the samples in my Context Card.

CONTEXT: who my clients are

My ideal clients are [describe them]. They want [their deepest desire] and they struggle with [their core challenge]. Any marketing you write should speak to them with respect and in their language.

CUES: what to draw on in the knowledge base

- My Context Card and any offer descriptions in this project's knowledge.
- My writing samples. Match their rhythm, warmth, and vocabulary.
- Your signature framework or method.

ETHICS: lines you never cross

- Never ask me for identifiable client information. If I paste something that looks like it includes a client's name, contact details, or private session content, pause and remind me to de-identify it or move it to my private, local AI first.
- Never invent testimonials, results, statistics, case studies, or credentials. Mark any assumption clearly as an assumption.
- Write marketing that is honest and non-manipulative: no false scarcity, no fear-based pressure, no guaranteed outcomes.
- You are a strategy partner, not a lawyer, accountant, therapist, or clinician. Tell me when a question needs one of them.
- Respect my capacity. If a plan would take more than [number] hours a week, say so and offer a lighter version.

4 Give it your context

Fill in the Context Card below in a document, keeping your answers short and honest, then add it to your project so every conversation starts from what matters. Pro tip: Have AI interview you about these sections and the key details of your business that will help it successfully act as your Strategic Partner.

- 1 **Claude:** in the project's knowledge area, click +, add it as text content, and name it Context Card.
- 2 **ChatGPT:** save it as a document called Context Card, then add it to the project's files.

YOUR CONTEXT CARD · FILL IN AND ADD TO YOUR PROJECT

CONTEXT CARD

WHO I AM

Name: [your name]

My coaching focus: [for example: relationships, leadership, health, life transitions]

My approach: [your methodology, modalities, trainings, and what makes your work yours]

WHO I SERVE

My ideal clients are: [who they are and where they are in life]

What they struggle with: [their core challenge]

What they deeply want: [the transformation they're seeking]

Words and phrases they use: [general patterns, never from a specific client]

WHAT I OFFER

Offer 1: [name] · [format] · [price] · [who it's for]

Offer 2: [name] · [format] · [price] · [who it's for]

How clients find me now: [referrals, workshops, podcasts, social media, my list]

WHERE I'M GOING

My goal for the next 90 days: [goal]

My goal for the next 12 months: [goal]

Hours per week I want to work: [number]

HOW I SOUND

Three words that describe my voice: [word], [word], [word]

Words or phrases I never use: [list]

Writing sample 1: [paste an email, caption, or page that sounds like you]

Writing sample 2: [paste another]

This card is about your business, so there's no reason to include any client by name. Describe the pattern rather than the person.

5 Give it your cues

Cues show your partner what good looks like. The more real examples it can learn from, the more its work sounds like you and fits your business. Gather what you already have and add it to your project's knowledge, the same way you added your Context Card.

- Your current offer descriptions or sales pages
- Your website's About page, plus a few emails, posts, or newsletters that sound like you
- Your signature framework, method, or intake questions

- Testimonials you have permission to use, with identifying details removed
- Any brand, voice, or style notes you already have

AI tools change quickly, so what a project can hold and how you add files to it will keep evolving. Keep your cues together in one folder, and you can bring them into whichever tool you use next.

Leave session notes and anything that could identify a client out of your cues.

Ten strategic conversations

A focus on reach and revenue

Once your instructions and Context Card are in place, start each of these in a new example tasks inside your project. Your partner already knows your business, so the prompts can stay short. Begin with the first three.

1 · YOUR 90-DAY REVENUE MAP

Using my Context Card, map my next 90 days of revenue using only the offers I already have. Show me a realistic target, the number of clients or sales it takes, where those people are most likely to come from, and a week-by-week rhythm that fits my capacity. Flag anything that feels unrealistic.

2 · REACH WITHOUT LIVING ON SOCIAL MEDIA

Design a referral and relationship plan that brings me five new clarity sessions a month without relying on social media. Consider past clients, colleagues, referral partners, workshops, speaking, podcasts, and community spaces. Give me the three highest-leverage moves first, with a script or message draft for each, written in my voice.

3 · THE CHALLENGER

Be my Challenger. Here's a plan I'm excited about: [describe it]. Challenge it with honesty and care. What am I not seeing? What could go wrong, what would a skeptical client think, and what's the smallest version I could test first?

4 · THE HONEST PRICING CHECK

Stress-test my pricing and packages. Be honest about what's holding me back, whether that's price, positioning, packaging, or my own hesitation. Tell me what you'd change first and why, and what it could mean for my revenue.

5 · YOUR SIGNATURE OFFER

Help me refine my main offer so it's clearer and more compelling. Ask me up to five questions first, then give me a one-sentence promise, who it's for and not for, what's included, and three names to consider.

6 · A GROUP PROGRAM IDEA

I'm considering a group program. Based on my Context Card, suggest two possible concepts, with the transformation, format, length, group size, price range, and what I'd need to fill it. Tell me honestly whether now is the right time.

7 · CLARITY SESSION FOLLOW-UP

Draft a warm follow-up message for someone who had a clarity session with me but hasn't decided yet. No pressure, no false urgency. Offer a helpful next step and leave the door open. Write it in my voice, 120 words or fewer.

8 · ONE INSIGHT, MANY PIECES

Here's an insight I share with clients often: [describe it in a few sentences, with no client details]. Turn it into a short newsletter, a LinkedIn post, a workshop title with three talking points, and a podcast pitch angle, all in my voice.

9 · THE OBJECTION MIRROR

What are the five most likely reasons my ideal clients hesitate to invest in coaching with me? For each, tell me what they may really be feeling underneath, and how I can address it with honesty and care, in conversation and in my marketing.

10 · THE WEEKLY CEO REVIEW

Let's do my weekly CEO review. Ask me, one at a time: what moved forward, what didn't, what I learned, where my energy went, and what matters most next week. Then give me my top three priorities and one thing to let go of.

Working with sensitive client information

Best practices

WHAT THE ICF EXPECTS

The ICF Code of Ethics asks coaches to keep the strictest confidentiality (Standard 2.1), to have clear agreements about what information is exchanged and how (2.2), to store and dispose of records, including electronic files, in a way that protects confidentiality, security, and privacy (2.4), and to meet those obligations through any technology they use, which the Code names as including artificial intelligence (2.5). In practice, that means you're responsible for where client information goes the moment you paste it anywhere.

*Licensed therapists and clinicians carry an extra layer through their licensing board and, in the U.S., HIPAA. Consumer AI plans are generally not set up for protected health information.

FOUR HABITS THAT PROTECT YOUR CLIENTS

- ☐ **01** Keep identifiable client details out of cloud AI, always.
- ☐ **02** When you want AI's help with session material, work locally, and choose local models only.
- ☐ **03** Review everything.
- ☐ **04** Tell your clients how technology shows up in your work.

• Set up a private AI with Ollama

Ollama is a free, open-source app that runs an AI model entirely on your own computer, so what you type never leaves your machine. Setup takes about 15 minutes, most of it waiting for a download. You'll want a Mac with Apple silicon (M1 or newer) or a recent Windows PC, ideally with 16 GB of memory, and about 5 to 10 GB of free space.

- 1 **Download the app** from ollama.com for Mac or Windows and install it like any other app.
- 2 **Choose a local model.** Start a new chat, choose **gemma3** in the model picker, and send a short message like "hello." The first time, it downloads the model (about 3.3 GB). That's the only moment it needs the internet, and it carries none of your data.
- 3 **Avoid cloud models.** Some models in the app are labeled **cloud** and run on Ollama's servers. Only choose models without that label.
- 4 **Test it with Wi-Fi off.** If it still answers, everything is happening on your computer.
- 5 **Encrypt your computer** with FileVault on a Mac (System Settings, then Privacy and Security) or BitLocker or Device Encryption on Windows.

YOUR COMPUTER	CHOOSE	DOWNLOAD SIZE
Older, or 8 GB of memory	gemma3:1b	about 0.8 GB
Most laptops, 16 GB of memory	gemma3 (the default)	about 3.3 GB
32 GB of memory or more	gemma3:12b	about 8.1 GB

You can drag a text file or PDF straight into the Ollama app. Newer Gemma models also appear in Ollama's library, so check their sizes against your memory before downloading.

IF YOUR COMPUTER CAN'T RUN A LOCAL MODEL

Local models need memory and storage that not every computer has, and that's okay. If Ollama won't install or runs too slowly on your machine, de-identify your notes by hand instead: remove names, contact details, employers, places, dates, and anything else that could identify your client, and keep your notes in the secure system you already use. Either way, don't paste session notes or client details into ChatGPT, Claude, or any other cloud AI tool, even with training turned off.

• Prompt: de-identify

Use this only in Ollama with a local model. Paste your notes first, then the prompt, and always read the result yourself.

LOCAL MODEL ONLY

You are a privacy assistant for a professional coach. De-identify the session notes I just shared.

- Replace every personal name with a role, such as "the client" or "the client's partner."
- Remove phone numbers, email addresses, and street addresses entirely.
- Generalize employers, cities, schools, and other specific places, such as "a mid-sized tech company" or "a large city."
- Remove dates of birth and exact ages, and any other detail that could identify this person.
- Keep the emotional and coaching content intact.

Then give me a numbered list of every change you made, so I can check your work.

• Prompt: reflection for supervision

LOCAL MODEL ONLY

You are a reflective supervisor for a coach. Using these session notes, help me reflect on myself as the coach rather than on the client.

- Where might my own patterns, reactions, or assumptions have shaped the session?
- What did I seem to avoid, rush, or over-focus on?
- What three questions could I bring to supervision or peer practice?

Do not diagnose the client or offer clinical interpretations. Keep your tone curious and kind.

Client transparency

Tell the truth

Telling clients plainly how AI shows up in your practice builds trust, and it honors the clear agreements the ICF Code asks for. Adapt this language for your client agreement or welcome packet.

FOR YOUR CLIENT AGREEMENT

How I use technology and AI

I use AI tools to support the business side of my practice, such as planning, scheduling, and writing. I never enter your name or any identifying details into cloud-based AI tools. If I use AI to help organize my own session notes, it runs entirely on my computer, and nothing is sent to an outside company. My records are stored [securely / encrypted on my own devices] and kept for [time period]. If you'd prefer I not use AI in any part of our work together, just tell me and I'll honor that.

If you record or transcribe sessions, including with Zoom's AI features or a note-taking app, add a line naming the tool, where the recording is stored, and how long it's kept, and ask for your client's consent before each engagement.

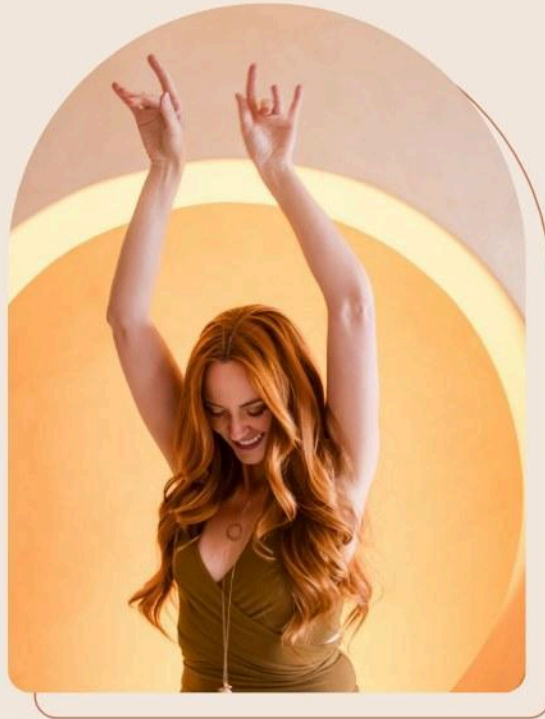
This is a starting point, and NOT legal advice. Adapt it to your practice, your credential or license, and the laws where you and your clients live.

THIS WEEK

Your next four moves

One small step at a time

- ☐ **01** Finish your Context Card and add at least 3 cues to your project.
- ☐ **02** Ask your Strategic Partner to map your next 90 days of revenue and growth.
- ☐ **03** Practice asking for what you want from AI with the 3Cs.
- ☐ **04** Add AI transparency language to your client agreement.



GOING FURTHER

Today you built one partner. Imagine a whole team.

In AI Dream Team®, we'll build a customized AI team for your business together that will give you the support structure of a multi-million dollar company—without the payroll costs or complexity. With your AI Dream Team in place, you can stay in your zone of genius and focus on the deeply human parts of your business and the work you most love doing.

AI DREAM
TEAM

[NATALIEMACNEIL.COM/ALYSSA](https://nataliemacneil.com/alyssa)

Sources: ICF Code of Ethics (effective April 1, 2025, revised May 2026), Standards 2.1 to 2.5, coachingfederation.org · Claude Help Center, "How can I create and manage projects?" · Ollama, "Ollama's new app," ollama.com/blog · Ollama model library, ollama.com/library. Menu names and model sizes current as of September 2026.

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