

A WORKBOOK FOR AGING-IN-PLACE PROFESSIONALS

The Practical ChatGPT Workbook

7 unusual ways to use AI in your business

Not another list of prompts for social media captions. These are the uses nobody puts in the highlight reel — with the exercises to actually make them stick.

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How To Use This Workbook

This is not a workbook you read. It's one you fill in.

Every section has three parts: a short explanation, a prompt you can copy, and an exercise with space to write down what happened. The writing matters more than the reading. People who write down what they got back from ChatGPT use it three months later. People who just read about it don't.

Pace yourself. There are seven sections here. If you try to do them all on a Saturday, you'll burn out by section three and never open this again. The four-week plan at the back paces it for you — roughly twenty minutes, twice a week.

You need one thing before you start: a free ChatGPT account at chat.openai.com. That's it. Nothing to install.

A note on what this is not. Nothing in this workbook asks ChatGPT to do your job. You hold the license, the certification, the field experience, and the judgment. Every exercise here is about doing your existing work faster or better. If a section ever feels like it's replacing your professional thinking, stop and skip it.

Part One: Where You Are Now

Be honest. Nobody sees this but you.

1. Which best describes you right now?

☐ I've never opened ChatGPT ☐ I opened it once, wasn't impressed, haven't been back ☐ I use it occasionally for writing emails or posts ☐ I use it most days but I suspect I'm barely scratching the surface

2. What's the single biggest time drain in your business right now?

3. What part of your job do you actively dread?

4. If you got back three hours a week, what would you do with them?

5. What's your honest concern about using AI in your work? (Privacy? Accuracy? Feeling like a fraud? Clients finding out? All valid — name it.)

Come back to question 5 at the end. Most people's concern changes shape once they've actually used the thing. Some concerns get smaller. At least one should get bigger and sharper — that's the privacy one, and it *should* sharpen.

Part Two: The Three Rules

Read these once. They prevent 90% of the problems people have.

Rule 1 — It's a conversation, not a search box

Google is a vending machine: word in, links out.

ChatGPT is a brilliant intern who just walked in the door and knows nothing about you. "Write me an email" gets you a generic email. "I'm a CAPS contractor in a small town, I finished a bathroom for this woman's mother three months ago, and I want to check in without sounding like I'm fishing for work" gets you something you can send.

And you don't have to get it right the first time. Say "shorter." Say "too formal." Say "try again, warmer." That back-and-forth *is* the skill.

Quick practice — do this before you go further. Type any request. Then reply to whatever it gives you with "make it half as long." Then reply with "now make it sound more like a person and less like a brochure." Watch what happens.

What did you notice? _____

Rule 2 — Never paste private client information

Not optional. Not ever.

Never enter: - Client names, even first names - Addresses, or photos showing house numbers, mail, or street signs - Medical records, diagnoses tied to a person, or medication lists - Photos showing faces - Anything from a chart, referral, or discharge summary

Instead, describe the situation:

"An 82-year-old woman living alone, moderate arthritis in both hands, one four-inch step at the front entry, adult daughter involved but out of state."

That gets you everything useful and identifies nobody. Notice you lost nothing by anonymizing it.

If you're an OT, nurse, or care manager: your professional obligations follow you into this tool. It is not a covered entity. Treat every box you type into as a public one.

If you're a contractor or designer: the rule still applies. Your clients let you inside their home. That's the same trust.

Rule 3 — It will be wrong with total confidence

This is where our industry gets hurt, so read it twice.

Ask for a grab bar mounting height, an ADA clearance dimension, or your state's permit requirement, and you will get a specific number delivered with total assurance. It may be wrong. It will not warn you.

Safe uses: writing, rewriting, organizing, brainstorming, rehearsing, summarizing, translating jargon, questioning your own thinking.

Unsafe uses: codes, dimensions, clinical guidance, legal requirements, reimbursement rules, product specifications, statistics you plan to publish.

The test: if being wrong about it could hurt someone, cost someone money, or land in a contract — verify it against your own reference.

Part Three: Set Up Your Context (Do This First)

Ten minutes here saves you five minutes every time you use ChatGPT afterward. It's the highest-return thing in this workbook and almost nobody does it.

Worksheet: Your Business Context

Fill this in longhand first. You'll paste it in next.

My role / credentials: _____

My service area: _____

Who I actually serve (be specific — "adult daughters 50-65 managing a parent's home from a distance" beats "seniors"):

What I do, in one sentence: _____

How I want to sound (circle: warm / direct / calm / practical / reassuring / plainspoken / other: _____)

How I do NOT want to sound: _____

Words my clients don't understand that I use anyway:

Now Load It In

☐ Click your name or initials in the corner ☐ Find **Custom Instructions** or **Personalization** ☐ Paste this, filled in from above:

I'm a [role] serving [area]. My clients are [who you serve]. My work focuses on [what you do].

When you write for me: use plain language at about a seventh-grade reading level. Be warm but not sentimental. No hype, no exclamation points, no marketing voice. Write the way a knowledgeable friend talks.

Never invent statistics, building codes, dimensions, or clinical guidance. If you're not certain, say so plainly and tell me to verify it.

☐ Save it

Date completed: _____

That last paragraph won't make it perfect. But it makes it noticeably more willing to say "I'm not sure" instead of handing you a confident wrong number. Worth the two seconds.

Part Four: The Seven Uses

Use 1 — Rehearse The Conversation You're Dreading

Why this one is first

Most of us lose projects in conversations, not in assessments. The daughter who thinks the quote is a scam. The 88-year-old who says "I've lived here fifty years." The out-of-state son who calls at 9pm and second-guesses everything.

You can practice those conversations before they happen. Out loud. With something that pushes back like a real person.

The prompt

I want you to role-play with me. You are the 55-year-old daughter of my client. Your mother is 84, lives alone, and has fallen twice. I've recommended \$6,000 of bathroom modifications. You think it's too expensive and you don't think she needs it yet. Be skeptical and a little defensive, the way a real person would be. Stay in character. I'll start.

Then talk to it. Respond to what it says. Let it push back.

When you're done — this is the part people skip:

Okay, step out of character. What did I handle well, and where did I lose you?

Exercise

The real conversation I'm dreading this month is with:

What makes it hard: _____

Now adapt the prompt above to that person and run it. Give it at least five back-and-forths.

What it said that caught me off guard:

When I stepped it out of character, it told me I lost it at:

One thing I'll say differently in the real conversation:

Level up

Run the same scenario three times playing three different people: the anxious daughter, the controlling son, the parent who flatly refuses. You'll notice your own default move — and where it fails.

Use 2 — Take A Picture Of The Room

Why it works

ChatGPT can look at photos. Tap the photo icon, upload, ask. No typing skill required, which makes this the easiest entry point for anyone who finds a blank text box intimidating.

The prompt

I'm an aging-in-place specialist. Looking at this bathroom, what fall risks do you see? Organize them by how urgent they are. Also tell me what you can't determine from a photo that I should check in person.

That last sentence forces it to name its own blind spots instead of bluffing. Use it every time.

Read this before you try it

This does not replace your assessment. You are the professional; your eyes and training are the assessment. What this does is act as a tired-Friday second set of eyes on

your fifth house of the day. It catches the throw rug in the corner and the towel bar somebody is clearly using as a grab bar.

Check your photo before uploading: no faces, no house numbers, no mail on the counter, no framed photos with names, no prescription bottles with labels.

Exercise

Use a room in your own home, or a stock photo, or a past job with the client's written permission and all identifiers removed.

Hazards I identified myself, before asking:

1. _____
2. _____
3. _____
4. _____

Hazards it named that I had not written down:

Things it flagged that were wrong or irrelevant:

(There will be some. Noticing them is the point of the exercise — it calibrates how much weight to give this.)

The bonus use — finished jobs

Upload an after photo:

Describe the safety improvements visible in this photo in plain, non-technical language a family member would understand. About 100 words.

That paragraph goes into your next proposal, your website, or your portfolio. Same photo, two jobs.

Use 3 — Talk To It In The Truck

Why this changes your week

You just left an assessment. You're in the driveway and everything is fresh. By the time you get home, feed the dog, and sit down at nine o'clock, half of it is gone and the notes take forty minutes.

ChatGPT has a voice mode — tap the icon and talk, like a phone call.

The prompt (say it out loud)

I just finished a home assessment. I'm going to talk through what I saw. Don't interrupt me — just listen. When I'm done, organize it into: safety concerns, recommended modifications, and questions I still need answered.

Then ramble. Exactly the way you'd tell your spouse about your day. "Front door has a four-inch threshold, she's using the wall to get down the hall, bathroom's the real problem, no hall lighting at all..."

You reach your own driveway and the notes are drafted.

Exercise

Do this after your very next site visit or client call. Not a hypothetical one — a real one.

Date I tried it: _____

How long I talked: _____ minutes

How long the notes usually take me at my desk: _____ minutes

What the notes were missing that I had to add myself:

Would I do this again? ☐ Yes ☐ No — because:

Safety: do this parked, not while driving.

Level up

Add a sentence to the prompt: "Then list the three questions I should have asked but didn't." That one is uncomfortable and useful.

Use 4 — Ask It To Reject Your Referral Pitch

The unusual move

Most of us grow on referrals — discharge planners, PTs, senior move managers, realtors, home health agencies. The normal instinct is to ask ChatGPT to *write* your pitch. Don't. Ask it to tear the pitch apart instead.

The prompt

You are a hospital discharge planner. You are overwhelmed, you have twelve discharges today, and you already have two contractors you trust. I'm going to give you my pitch for why you should refer to me. Tear it apart. Tell me honestly why you'd ignore this, and what would actually make you pay attention.

Then paste in whatever you currently use — your email, your elevator pitch, the back of your card.

An honest note on why this works

ChatGPT does not know your local discharge planner. It has never met her. What it has done is absorb an enormous amount of writing about how overloaded professionals triage their attention — and it will name the weak spot in your pitch faster than any friend will, because friends are polite and it isn't.

Exercise

The pitch I currently use (paste or write it here):

The three criticisms it gave me:

1.

2.

3.

Which one stung because it was true:

My rewritten opening line:

Level up

Run it again as a realtor. Then an OT. Then a skeptical adult child. Then — hardest — the client who ghosted you after your estimate. Each audience wants something different in the first eight words.

Use 5 — Build Your Translator

The vocabulary problem

Every one of us has one, and most of us can't hear it anymore.

We say	They hear
Transfer	<i>nothing</i>
Durable medical equipment	a bill
Zero-threshold entry	expensive
ADL decline	<i>nothing at all</i>
Universal design	something for disabled people

Meanwhile the daughter nods along, understands about forty percent, goes home, and doesn't approve the project. Not because she disagreed — because she never actually understood you.

The prompt

Rewrite this for a 55-year-old daughter with no medical or construction background. Seventh-grade reading level. Warm, not clinical. Don't dumb it down or talk down to her — just make it human. Keep it under 150 words.

The better prompt (flip it around)

Here's what I plan to tell this family. What will they misunderstand? What are they likely to worry about that I haven't addressed?

The objection you didn't see coming is the one that kills the project.

Exercise

A paragraph I actually use with clients (from a proposal, assessment summary, or email):

Run it through both prompts above.

Words it flagged that I didn't realize were jargon:

A worry it predicted that I had never addressed:

Is the rewrite still accurate? ☐ Yes ☐ No — what did I have to fix?

Always check this one for accuracy. Simplifying language sometimes simplifies the meaning too, and you're the one who knows where the line is.

Your jargon list

Build this over the next month. Every time a client looks confused, write the word down.

My word	What I'll say instead

Use 6 — Ask What You're Missing

Why solo practitioners need this most

Our training shapes what we see. Contractors see structure. OTs see function. Care managers see systems and support. Three of us walk into the same house and see three different houses.

If you work alone, you don't have a colleague down the hall to catch your blind spot.

The prompt

Here's the situation: [describe it — no names or identifying details]. Here's what I'm recommending: [list it]. What am I missing? What would a different kind of professional — an OT, a contractor, a geriatric care manager, a fall prevention specialist — flag that I might not be thinking about?

What to expect

You will disagree with most of it. That's fine and it's not the point. About one time in five it names something real: the lighting nobody considered, the medication side effect actually driving the balance problem, the fact that the caregiving spouse is also 80. The dog. Nobody ever thinks about the dog.

This is not a colleague. But at 7pm on a Tuesday, it's what you've got.

Exercise

A current case, anonymized:

What I'm recommending:

Everything it suggested (list all of it, even the nonsense):

The one thing worth following up on:

Who I should actually ask about it (a real human — an OT, a PT, a pharmacist, a colleague):

That last line is the whole discipline of this exercise. The tool surfaces the question. A qualified person answers it.

Use 7 — Stop Starting Over

You already did this in **Part Three**. If you skipped it, go back — it's the one that turns this from a novelty into part of how you work.

☐ Confirmed: my Custom Instructions are saved

One thing I want to add to them now that I've used it more:

Revisit these every few months. As your business changes, so should the context you're feeding it.

Part Five: When It Doesn't Work

Most people quit at their first bad output and conclude the tool is overhyped. Nearly every bad output has one of these five causes.

"It gave me generic corporate garbage." You didn't give it context, or you accepted the first draft. Tell it who the reader is, what you want them to feel, and how long it should be. Then push back on what it gives you — twice.

"It sounds nothing like me." Paste in three paragraphs you actually wrote and say: *"This is my voice. Match it."* Instant improvement.

"It made something up." It will. Add *"if you're not certain, say so"* to your prompt, and verify anything with a number, a code, or a clinical claim. This is a permanent feature, not a bug you can fix.

"It's too wordy / too many bullet points / too many em-dashes." Say so, specifically. *"No bullet points. Plain paragraphs. Cut it by half."* It will comply.

"I don't know what to ask it." Ask it that. Literally: *"I'm a CAPS contractor who's overwhelmed by follow-up with past clients. What could you help me with that I probably haven't thought of?"*

Part Six: Your Four-Week Plan

Two sessions a week, about twenty minutes each. Check them off.

Week 1 — Foundation

☐ Create your account ☐ Complete the Business Context worksheet (Part Three) ☐
Load your Custom Instructions ☐ Do the Rule 1 practice exercise

Week 2 — The two highest-value uses

☐ Use 1: rehearse a real conversation you're dreading ☐ Use 3: voice-dictate notes
after a real site visit

Week 3 — Client communication

☐ Use 5: run one real client paragraph through the translator ☐ Use 2: photo analysis
on one room ☐ Start your jargon list

Week 4 — Growth

☐ Use 4: get your referral pitch rejected, then rewrite it ☐ Use 6: run one anonymized
case through "what am I missing" ☐ Revisit your Custom Instructions and improve
them

Part Seven: Did It Work?

Fill this in at the end of four weeks.

Which use did I actually keep doing?

Which one did I try once and abandon?

Why? _____

Rough hours saved per week: _____

Something that came out better, not just faster:

Go back to Part One, question 5 — my original concern about using AI. Has it changed?

One thing I'll keep doing next month:

Prompt Library

Tear this page out and keep it near your desk.

Rehearse a hard conversation

I want you to role-play with me. You are [person]. [Their situation and position.] Be skeptical and a little defensive, the way a real person would be. Stay in character. I'll start.

(after) Okay, step out of character. What did I handle well, and where did I lose you?

Analyze a room photo

I'm an aging-in-place specialist. Looking at this [room], what fall risks do you see? Organize them by how urgent they are. Also tell me what you can't determine from a photo that I should check in person.

Describe a finished job

Describe the safety improvements visible in this photo in plain, non-technical language a family member would understand. About 100 words.

Dictate assessment notes

I just finished a home assessment. I'm going to talk through what I saw. Don't interrupt me — just listen. When I'm done, organize it into: safety concerns, recommended modifications, and questions I still need answered.

Stress-test your pitch

You are [a discharge planner / realtor / OT]. You are overwhelmed and you already have people you trust. I'm going to give you my pitch. Tear it apart. Tell me honestly why you'd ignore this, and what would actually make you pay attention.

Translate for families

Rewrite this for a 55-year-old daughter with no medical or construction background. Seventh-grade reading level. Warm, not clinical. Don't talk down to her. Under 150 words.

Predict objections

Here's what I plan to tell this family. What will they misunderstand? What are they likely to worry about that I haven't addressed?

Find your blind spot

Here's the situation: [anonymized]. Here's what I'm recommending: [list]. What am I missing? What would a different kind of professional flag that I might not be thinking about?

Match your voice

This is my writing. Match this voice: [paste three of your own paragraphs].

Find uses you haven't thought of

I'm a [role] who's overwhelmed by [problem]. What could you help me with that I probably haven't thought of?

The Three Rules, One Last Time

- 1. It's a conversation. Push back on the first draft.
 - 2. Never paste private client information. Not names, not addresses, not photos with faces, not anything from a chart.
 - 3. Verify anything with a number attached. Codes, dimensions, clinical guidance, regulations.
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You are still the professional. This makes you faster. It does not make you right.

The Aging In Place Hub | aginginplacedirectory.com

Notes
