

AI Made Simple: Improving Distributor Workflows

This handout explains how organizations can move beyond one-off AI chats and deploy repeatable, reliable workflow assistants using ChatGPT Projects.

ChatGPT Dashboard Overview

The ChatGPT interface is organized into five core areas:

New Chat

- Used for one-off conversations
- Ideal for brainstorming and quick questions
- No structure or workflow enforcement
- Not designed for repeatable business processes

Custom GPTs

- Custom GPTs are independent tools outside of Projects
- Explore GPTs to locate tools or build your own

Projects

- Used for workflow assistants and grouping related chats
- Assistants contain instructions and files
- Projects used as assistants are the central focus of this workshop

Chat History

- Record of past conversations
- Less important once workflows move into Projects

Prompt Window

- Primary interface for communicating with AI
- Becomes simpler and more effective when using Projects

Why Use Projects Instead of New Chat

- Execute complex tasks without excessive prompting
- Access shared memory across conversations within a Project
- Clean, organized chats directly under each assistant
- Collaborate and share document sets
- Higher first-pass accuracy
- Correct handling of structured data such as Excel
- Support for menus, loops, breaks, and conditional workflows

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Projects as Workflow Assistants

Projects are not only folders — they are workflow assistants

Five Steps to Create a Workflow Assistant

1. Document the workflow
2. Convert the workflow documentation into Project instructions
3. Create a Project and name it as the workflow assistant
4. Add instructions and supporting files
5. Test, refine, and deploy

Use Case: Prioritize Customers by Outstanding Balance

Analyze accounts receivable aging buckets (30 / 60 / 90 / 120+ days) to quickly identify customers requiring immediate attention.

Use Case: Compare Aging vs Historical Payment Behavior

Flag customers whose current overdue balance exceeds their normal payment cycle, while ignoring customers who consistently pay later but remain within expectations.

Contact Information

I help organizations:

- Adopt AI responsibly and effectively
- Design workflow assistants
- Deploy AI across teams

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