

Powered By

**Introducing
ChatGPT**

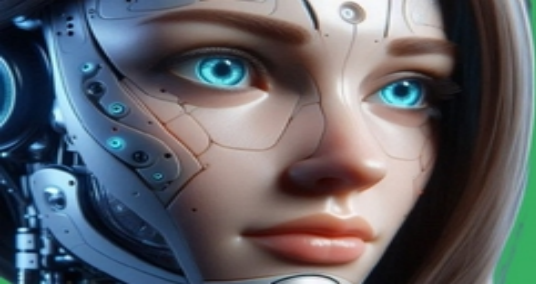
We've trained a model called ChatGPT which interacts in a conversational way. The dialogue format makes it possible for ChatGPT to answer followup questions,



How To Create Custom GPTs For Local Business

Business Solutions





How To Create Custom GPTs For Local Business

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How To Create Custom GPTs For Local Business

Table of Contents

Introduction.....	7
Chapter 1: Understanding Custom Chatbots for Local Businesses	10
What is a Custom Chatbot?.....	10
Why Local Businesses Need Chatbots.....	11
How ChatGPT Makes Chatbot Creation Easy.....	12
What You Will Learn in This Book.....	12
Next Steps.....	13
Chapter 2: Planning Your Custom Chatbot for Local Businesses...	14
Defining the Chatbot’s Purpose.....	14
Understanding the Business’s Needs.....	15
Structuring the Conversation Flow.....	15
Setting Boundaries for the Chatbot.....	16
Gathering the Information the Chatbot Needs.....	17
Next Steps.....	17
Chapter 3: Creating Your Custom Chatbot Step by Step.....	18
Step 1: Setting Up a Custom GPT in ChatGPT.....	18
How to Access the Custom GPT Builder.....	19
Step 2: Defining the Chatbot’s Role and Behavior.....	19
Step 3: Structuring Conversations for a Smooth User Experience.....	20
Step 4: Adding Custom Responses and Calculations.....	21
Step 5: Testing and Refining Your Chatbot.....	21
Next Steps.....	22
Chapter 4: Deploying Your Chatbot for Local Businesses.....	23
Chapter 5: Maintaining and Improving Your Chatbot.....	26
Tracking Chatbot Performance.....	26
Updating and Refining Responses.....	27
Handling Common Issues.....	28
Encouraging Business Owners to Use the Chatbot Effectively... ..	28
Next Steps.....	29
Chapter 6: Using GPTs for Internal Business Processes.....	30
Automating Repetitive Tasks.....	30



How To Create Custom GPTs For Local Business

<u>Assisting Employees with Knowledge and Workflows.....</u>	<u>31</u>
<u>Example Use Cases.....</u>	<u>32</u>
<u>HR Assistant.....</u>	<u>32</u>
<u>IT Troubleshooting Bot.....</u>	<u>32</u>
<u>Internal Training Assistant.....</u>	<u>33</u>
<u>Tips for Seamless Internal Adoption.....</u>	<u>33</u>
<u>Next Steps.....</u>	<u>34</u>
<u>Chapter 7: Using GPTs for Customer-Facing Chatbots.....</u>	<u>35</u>
<u>How GPTs Improve Customer Interactions.....</u>	<u>35</u>
<u>Setting Up a Chatbot for Customer Service.....</u>	<u>36</u>
<u>Example Use Cases for Customer-Facing Chatbots.....</u>	<u>37</u>
<u>Answering FAQs.....</u>	<u>37</u>
<u>Guiding Customers Through Processes.....</u>	<u>37</u>
<u>Providing Product or Service Recommendations.....</u>	<u>38</u>
<u>Optimizing Responses for User Engagement.....</u>	<u>38</u>
<u>Next Steps.....</u>	<u>39</u>
<u>Chapter 7: Using GPTs for Customer-Facing Chatbots.....</u>	<u>40</u>
<u>How GPTs Improve Customer Interactions.....</u>	<u>40</u>
<u>Setting Up a Chatbot for Customer Service.....</u>	<u>41</u>
<u>Example Use Cases for Customer-Facing Chatbots.....</u>	<u>42</u>
<u>Answering FAQs.....</u>	<u>42</u>
<u>Guiding Customers Through Processes.....</u>	<u>42</u>
<u>Providing Product or Service Recommendations.....</u>	<u>43</u>
<u>Optimizing Responses for User Engagement.....</u>	<u>43</u>
<u>Next Steps.....</u>	<u>44</u>
<u>Chapter 8: Example – Creating a Mortgage Broker Custom GPT..</u>	<u>45</u>
<u>Why Use ChatGPT to Create Custom GPT Instructions?.....</u>	<u>45</u>
<u>Step 1: Running the Script to Generate GPT Instructions.....</u>	<u>46</u>
<u>Predefined Script for ChatGPT.....</u>	<u>46</u>
<u>Final Notes for Deployment.....</u>	<u>51</u>
<u>Step 2: Implementing the Instructions in a Custom GPT.....</u>	<u>52</u>
<u>How to Set Up the Custom GPT.....</u>	<u>52</u>
<u>Step 3: Testing the Mortgage Broker GPT.....</u>	<u>53</u>
<u>Step 4: Generating Printable Outputs.....</u>	<u>53</u>



How To Create Custom GPTs For Local Business

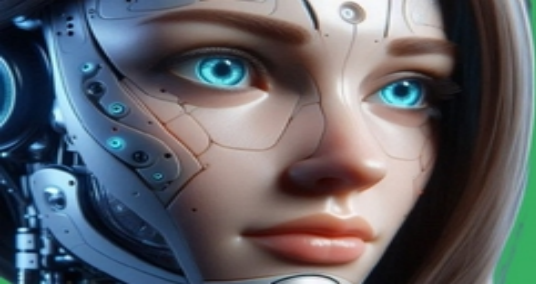
<u>Step 5: Fine-Tuning and Improving the Chatbot.....</u>	<u>54</u>
<u>Next Steps.....</u>	<u>55</u>
<u>Chapter 9: Deploying, Maintaining, and Optimizing Your Custom GPT.....</u>	<u>56</u>
<u>Testing for Accuracy and Effectiveness.....</u>	<u>56</u>
<u>How to Test the GPT Before Deployment.....</u>	<u>57</u>
<u>Gathering Feedback from Users.....</u>	<u>57</u>
<u>How to Collect Feedback.....</u>	<u>58</u>
<u>Updating and Refining Responses Over Time.....</u>	<u>58</u>
<u>Best Practices for Updating a Custom GPT.....</u>	<u>58</u>
<u>Handling Limitations and User Expectations.....</u>	<u>59</u>
<u>Common Limitations and How to Address Them.....</u>	<u>59</u>
<u>Troubleshooting and Optimizing Performance.....</u>	<u>60</u>
<u>Common Issues and Fixes.....</u>	<u>60</u>
<u>Final Steps: Ensuring Long-Term Success.....</u>	<u>61</u>
<u>Appendix.....</u>	<u>62</u>
<u>Sample Custom GPT Instruction Templates.....</u>	<u>62</u>
<u>Mortgage Broker Assistant GPT (Jason).....</u>	<u>64</u>
<u>==<.....</u>	<u>64</u>
<u>Some Examples of Internal Processes that Could be Streamlined by a Custom GPT.....</u>	<u>65</u>
<u>Human Resources (HR) & Employee Management.....</u>	<u>65</u>
<u>Customer Service & Client Management.....</u>	<u>65</u>
<u>IT & Technical Support.....</u>	<u>66</u>
<u>Sales & Marketing.....</u>	<u>66</u>
<u>Finance & Accounting.....</u>	<u>66</u>
<u>Operations & Supply Chain.....</u>	<u>67</u>
<u>Training & Knowledge Management.....</u>	<u>67</u>
<u>Legal & Compliance.....</u>	<u>67</u>
<u>Facility & Office Management.....</u>	<u>67</u>
<u>Glossary of Key Terms.....</u>	<u>68</u>
<u>Recommended Tools and Platforms.....</u>	<u>69</u>
<u>For Custom GPT Creation and Testing.....</u>	<u>69</u>
<u>Note that ChatGPT Plus is a requirement for creating Custom</u>	



How To Create Custom GPTs For Local Business

GPTs. This could be your own account or your clients account. Creating separate accounts for individual clients has the benefit of segregation. So you can manage usage and charges easier.

.....	69
<u>For Integrating GPTs with Business Systems.....</u>	<u>69</u>
<u>For Collecting User Feedback.....</u>	<u>69</u>
<u>Final Notes.....</u>	<u>70</u>



How To Create Custom GPTs For Local Business

Introduction

Chatbots have become powerful tools for businesses of all sizes. They help automate customer interactions, answer questions instantly, and even assist with everyday business processes. In the past, creating a chatbot required coding skills and a deep understanding of artificial intelligence.

But today, thanks to tools like OpenAI's ChatGPT, anyone can build a custom chatbot tailored to a specific business need—**without writing a single line of code.**

This book is designed to help you understand how to create and customize GPT chatbots using OpenAI's ChatGPT. The focus is on building chatbots that can be sold to **local businesses**, helping them improve their customer service, streamline operations, and ultimately grow their business.

Whether you're looking to start a chatbot development service or simply want to learn how to create AI-powered assistants, this guide will walk you through the process in a practical, easy-to-follow way.

Unlike large enterprises that have the resources to develop complex AI solutions, small and local businesses often lack the time, expertise, or budget to create custom automation tools. That's where you come in.

By learning how to create effective chatbots, you can provide local businesses with a valuable service, offering them an affordable and efficient way to improve their customer interactions. From answering frequently asked questions to assisting with bookings,



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lead generation, and even internal processes, chatbots can handle many tasks that otherwise take up valuable time.

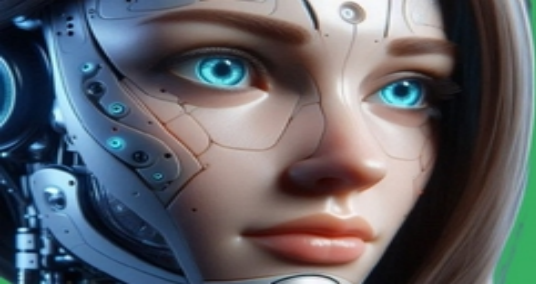
In this guide, we'll break down everything you need to know, step by step. You'll learn how to plan, build, and optimize custom chatbots for different business needs. The approach is **practical and non-technical**, so you don't need a background in programming or AI to follow along. The goal is to equip you with the skills and knowledge to create chatbots that businesses will want to use and pay for.

To make things even clearer, we'll use a real-world example, a **Mortgage Broker chatbot**, to show you exactly how the process works. You'll see how to define the chatbot's role, guide its responses, and ensure it provides useful and accurate information. By the end of this book, you'll have the confidence to create and sell chatbots that can transform the way local businesses interact with their customers.

If you've ever wanted to build and sell digital products but weren't sure where to start, this book will give you the foundation you need. Let's get started and unlock the potential of custom chatbots for local businesses.

This book shows you how to create Custom GPTs (chatbots) using OpenAI's ChatGPT. To create Custom GPTs you will need (at least) a ChatGPT Plus account.

The Custom GPTs you will be creating are best for internal processes. They can be shared with staff to help them do their jobs faster, more efficiently and with less effort.



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However the process described here is the same process for creating instructions for customer facing chatbots.

I will cover the exact practical steps for creating customer facing chatbots in a separate book – Customer Facing Easy AI Chatbots For Local Business.

In that publication you will discover how to convert the Custom GPT instructions into a customer facing chatbot using our chatbot Wordpress plugin.

It's recommended that you read the entire book to ensure you have all the information needed to create, deploy and manage chatbots.

However the key practical steps to creating chatbots can be found in Chapter 8.



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Chapter 1: Understanding Custom Chatbots for Local Businesses

Chatbots are becoming an essential tool for businesses, allowing them to provide instant responses, improve customer service, and automate routine tasks. While big companies have been using chatbots for years, small and local businesses are just beginning to realize their value. Many business owners don't have the time or technical knowledge to create their own chatbots, which is where you come in.

By learning how to create custom chatbots, you can offer a valuable service to local businesses, helping them streamline their operations and engage with customers more effectively. Whether it's answering frequently asked questions, handling appointment bookings, or guiding customers through a process, chatbots can save businesses time and improve their overall efficiency.

What is a Custom Chatbot?

A custom chatbot is a virtual assistant designed to interact with customers or employees in a way that fits a specific business need. Unlike generic chatbots that provide basic responses, a custom chatbot is **trained to follow specific instructions** and handle particular tasks.

For example, a mortgage broker may need a chatbot that can **answer customer inquiries about home loans, explain different mortgage options, and even guide customers through the application process**. A restaurant, on the other hand, might want a



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chatbot that **helps customers make reservations, provides menu recommendations, and answers common questions about opening hours or dietary options.**

What makes these chatbots “custom” is that they are built with a clear purpose in mind, ensuring they provide **relevant and helpful** responses based on the business they serve.

Why Local Businesses Need Chatbots

Local businesses thrive on **good customer service**, but they often struggle with **limited time and staff**. Owners and employees are busy handling multiple tasks at once, making it difficult to respond to customer inquiries promptly. A chatbot can step in to handle routine questions and tasks, allowing business owners to focus on running their business.

Here are a few ways chatbots can help local businesses:

- **Faster Response Times:** Customers today expect quick responses. A chatbot ensures that no inquiry goes unanswered, even outside business hours.
- **24/7 Availability:** Unlike human staff, a chatbot can operate around the clock, helping customers at any time of the day or night.
- **Increased Efficiency:** By handling repetitive questions, chatbots free up employees to focus on more important tasks.
- **Lead Generation:** A chatbot can collect customer details, helping businesses generate leads without extra effort.
- **Consistent Customer Experience:** A chatbot ensures that every customer gets the same helpful and professional response, improving the overall experience.



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How ChatGPT Makes Chatbot Creation Easy

In the past, building a chatbot required **coding skills** and **advanced AI knowledge**. But with tools like **ChatGPT**, anyone can create a chatbot simply by providing **clear instructions** on how it should behave and what it should do.

ChatGPT works by following a set of instructions called a **custom GPT prompt**. This prompt defines:

- The chatbot's **role and personality** (for example, a friendly mortgage advisor or a professional booking assistant).
- The **types of questions it can answer** (such as mortgage rates, loan requirements, or application steps).
- Any **restrictions** to keep it focused on its purpose (for example, a mortgage chatbot should not answer questions about unrelated topics).

The best part? **No coding is required**. With the right instructions, you can create a chatbot that fits any local business's needs.

What You Will Learn in This Book

Throughout this book, you will learn how to **plan, build, and optimize a custom chatbot** using ChatGPT. The goal is to help you create chatbots that businesses will actually want to use—and pay for.

To make the process as clear as possible, we will walk through the **creation of a Mortgage Broker chatbot** as an example. You will see exactly how to:

- Define the chatbot's role and instructions.
- Set up a conversation flow that guides users step by step.



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- Ensure the chatbot provides useful and reliable information.
- Generate a **printable output** that helps customers take action (such as a mortgage summary or loan comparison).
-

By the end of this book, you will have a **complete understanding of how to create and customize chatbots for local businesses**. You will also know how to use this knowledge to sell chatbot services, helping businesses improve their operations while earning an income for yourself.

Next Steps

Now that you understand the basics of custom chatbots and their value for local businesses, it's time to dive into the practical side of chatbot creation. In the next chapter, we'll explore **how to plan your chatbot effectively**, ensuring it meets the needs of the business it is designed for.



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Chapter 2: Planning Your Custom Chatbot for Local Businesses

Before you start building a chatbot, it's important to have a clear plan. A well-planned chatbot will provide helpful and relevant responses, making it a valuable tool for the business it serves. Without proper planning, the chatbot might give vague or unhelpful answers, leading to frustration for both the business and its customers.

In this chapter, we'll go through the key steps to planning an effective chatbot, including defining its role, understanding the business's needs, and structuring conversations in a way that makes sense for users.

Defining the Chatbot's Purpose

Every chatbot needs a clear purpose. If a chatbot tries to do too much, it can become confusing and ineffective. Instead, it should focus on solving **one main problem** for the business.

Ask yourself:

- What does this business need help with?
- What tasks can be automated to save time?
- What questions do customers ask most often?

For example, a mortgage broker's chatbot should **help potential borrowers understand their mortgage options, check their eligibility, and guide them through the application process**. A chatbot for a restaurant, on the other hand, might focus on **taking reservations, answering menu-related questions, and providing opening hours**.



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By narrowing the chatbot's focus, you ensure it provides useful and reliable responses rather than trying to cover too many topics.

Understanding the Business's Needs

To create a chatbot that businesses will actually use, you need to understand their day-to-day challenges. Many local businesses struggle with time-consuming customer inquiries, repetitive administrative tasks, and missed opportunities due to slow response times.

Consider these common business needs:

- **Customer support:** Answering frequently asked questions quickly and accurately.
- **Lead generation:** Collecting customer contact details for follow-ups.
- **Process automation:** Guiding customers through a specific process, such as booking an appointment or filling out an application form.

For a mortgage broker, customers often ask:

- "What mortgage options are available to me?"
- "How much can I borrow?"
- "What documents do I need to apply for a loan?"

If the chatbot can answer these questions accurately and provide next steps, it will be a valuable tool for both the broker and their customers.

Structuring the Conversation Flow

A well-structured chatbot doesn't just provide answers—it guides the user through a logical process. The best way to do this is by **breaking the chatbot's responses into simple steps.**



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Instead of asking users to provide all their information at once, the chatbot should gather details **one step at a time**. This keeps the conversation natural and makes it easier for users to follow along.

For example, a mortgage chatbot might follow this conversation flow:

1. Greet the user and ask what they need help with.
2. If they want to check mortgage options, ask for basic details (such as income and loan amount).
3. Provide an estimated mortgage rate based on their input.
4. Offer to generate a **printable summary** of their options.
5. Ask if they'd like to be connected to a mortgage specialist for further assistance.

By structuring the chatbot's responses in a logical order, you make it easier for users to interact with the chatbot and get the information they need.

Setting Boundaries for the Chatbot

To keep the chatbot effective, it's important to set clear boundaries on what it can and cannot do. If a user asks an unrelated question, the chatbot should politely let them know it can't help.

For example, a mortgage chatbot should not provide advice on investments, taxes, or unrelated financial matters. Instead, it should respond with:

“Sorry, I can only assist with mortgage-related questions. How can I help with your mortgage inquiry?”

Setting these limits prevents confusion and ensures the chatbot stays focused on its core purpose.



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Gathering the Information the Chatbot Needs

Once you've defined the chatbot's purpose and conversation flow, the next step is gathering the information it needs to provide useful answers. This could include:

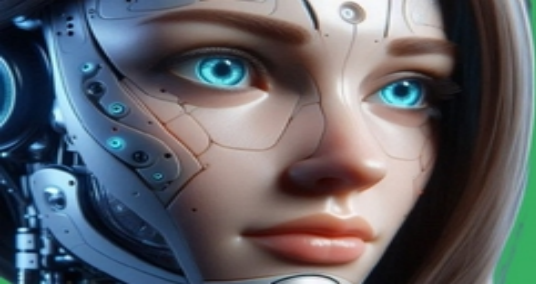
- **Commonly asked questions** the business receives.
- **Industry-specific knowledge**, such as mortgage rates or legal requirements.
- **Links to helpful resources** users may need, like loan application forms.

If the chatbot is providing financial estimates, it may also need access to **simple calculation formulas** to generate results based on user input.

The more prepared you are with relevant information, the more helpful and accurate the chatbot will be.

Next Steps

With a solid plan in place, you're ready to start building your chatbot. In the next chapter, we'll go step by step through the process of creating a custom chatbot using ChatGPT, showing you how to define its role, set up its instructions, and refine its responses for real-world use.



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Chapter 3: Creating Your Custom Chatbot Step by Step

Now that you have a solid plan for your chatbot, it's time to start building it. In this chapter, we will go step by step through the process of creating a **custom chatbot using ChatGPT**, defining its role, setting up instructions, and ensuring it provides useful responses.

One of the best things about ChatGPT is that you don't need to know how to code to create a chatbot. Instead, the chatbot's behaviour is controlled by a **set of instructions** that guide how it interacts with users. These instructions define its role, personality, and conversation flow, ensuring it responds in a way that suits the business it is built for.

In this chapter, we will use the **Mortgage Broker chatbot** as an example, but the same process can be applied to any local business.

Step 1: Setting Up a Custom GPT in ChatGPT

To create a custom chatbot, you will need access to OpenAI's **Custom GPT** feature, which allows you to customize ChatGPT's responses.



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How to Access the Custom GPT Builder

1. Open ChatGPT and sign in to your account.
2. Navigate to the **Explore GPTs** section.
3. Click **Create a GPT** to start building a custom chatbot.
4. Follow the on-screen steps to set up your chatbot's basic settings.

Once inside the GPT builder, you will have the ability to **define your chatbot's instructions**. This is where you will tell the chatbot what its role is, how it should respond, and what information it should focus on.

Step 2: Defining the Chatbot's Role and Behavior

The most important part of creating a chatbot is defining **clear and precise instructions**. These instructions shape how the chatbot interacts with users, what kind of questions it can answer, and how it should guide users through a process.

Here's an example of instructions for a **Mortgage Broker chatbot**:

Role:

"You are Jason, a professional mortgage broker assistant. You help users understand their mortgage options, guide them through the application process, and answer questions related to home loans. You do not provide legal or investment advice. If a user asks something unrelated to mortgages, respond with: 'Sorry, I can't help with that.'"

Personality:

"You are professional, friendly, and knowledgeable. You provide clear and helpful explanations, keeping the conversation simple and



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easy to understand."

Core Tasks:

- Answering mortgage-related questions.
- Helping users check their eligibility.
- Providing estimated loan calculations.
- Guiding users through the application process.
- Offering a **printable summary** of mortgage options.

By setting these clear instructions, you ensure that the chatbot stays **focused and useful** for its intended purpose.

Step 3: Structuring Conversations for a Smooth User Experience

A well-designed chatbot guides users through a conversation **step by step**, rather than overwhelming them with too much information at once. This makes interactions feel more natural and easier to follow.

For example, if a user wants to check what mortgage options are available, the chatbot should **ask for information one step at a time** instead of requiring all details upfront.

Example Conversation Flow:

1. **Chatbot:** "Hi! How can I help with your mortgage inquiry?"
2. **User:** "I want to see what mortgage options are available."
3. **Chatbot:** "Great! Are you a first-time buyer or looking to refinance?"
4. **User:** "I'm a first-time buyer."
5. **Chatbot:** "Got it! What is your estimated annual income?"
6. **User:** "About \$60,000."
7. **Chatbot:** "Thanks! Based on your income, you may qualify for



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a loan up to [amount]. Would you like a printable summary of this estimate?"

By breaking the conversation into small, manageable steps, the chatbot makes it **easier for users to provide information** and receive relevant answers.

Step 4: Adding Custom Responses and Calculations

In some cases, your chatbot may need to **perform calculations or provide personalized results** based on user input. For example, a mortgage chatbot might calculate estimated loan amounts based on income, down payment, and interest rates.

If the chatbot needs to generate a specific output—such as a **mortgage summary or a loan comparison report**—it should ask the user if they would like it in a **printable format (such as PDF or text file)**.

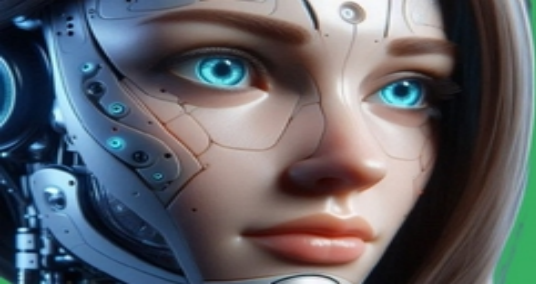
Step 5: Testing and Refining Your Chatbot

Once your chatbot is set up, it's important to **test it** by having conversations as if you were a real user.

During testing, ask yourself:

- Does the chatbot **provide clear and helpful answers**?
- Does it follow the correct **conversation flow**?
- Does it stay **focused on its purpose**?
- Are there any **gaps or missing information**?

If needed, go back and adjust the instructions to fine-tune the chatbot's responses.



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Next Steps

Now that you've built your chatbot and tested it, the next step is **deploying it for business use**. In the next chapter, we'll explore how to integrate the chatbot into a business's workflow and ensure it provides real value to customers.



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Chapter 4: Deploying Your Chatbot for Local Businesses

Now that you have built and tested your chatbot, the next step is to deploy it so that businesses can start using it. A chatbot is only valuable if it is easily accessible and integrates smoothly into a business's workflow. In this chapter, we'll go through the practical steps to make your chatbot available for business use, including where it can be deployed, how to integrate it into a website or social media, and how to ensure a smooth experience for both the business and its customers.

A chatbot should be placed where customers are most likely to interact with it. Depending on the type of business, this could be a website chat widget for handling customer inquiries, Facebook Messenger for responding to social media messages, WhatsApp or SMS for businesses that communicate with customers via phone, or email automation to handle inquiries.

For example, a mortgage broker might want the chatbot embedded on their website so potential borrowers can ask about loan options at any time.

A restaurant, on the other hand, may prefer to have the chatbot available on Facebook Messenger to assist customers with reservations and menu questions.

One of the most effective ways to deploy a chatbot is by embedding it on a business's website. The technical steps for doing this will be



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covered later in this book, but for now, it's important to understand that a chatbot should be placed in a way that is easy for customers to access. If a chatbot is difficult to find, customers won't use it.

Many businesses interact with their customers through Facebook, Instagram, and WhatsApp. A chatbot can be set up to handle common questions, automate responses, and collect leads through these platforms.

For example, a mortgage chatbot on Facebook Messenger can answer basic loan questions and schedule callbacks for more complex inquiries.

A restaurant chatbot on WhatsApp can take orders and confirm reservations automatically. Businesses that already rely on social media for customer interactions will benefit greatly from chatbot automation, as it saves time and ensures fast responses.

A chatbot should enhance a business's customer service, not create confusion. To ensure a smooth experience, keep these things in mind. Test different deployment options to see what works best for the business. Keep conversations simple and avoid unnecessary back-and-forth.

Ensure easy access to human support when needed. Regularly update responses to keep information accurate and relevant. If a business owner finds that customers are struggling to use the chatbot, adjustments can be made to improve the flow and clarity of responses.

Once a chatbot is live, it's important to track how well it is



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performing. Businesses should monitor how many customers interact with the chatbot, what common questions are being asked, where users drop off in the conversation, and customer feedback on the chatbot experience.

By analyzing chatbot interactions, businesses can improve responses, refine conversation flow, and make the chatbot more effective over time.

Now that the chatbot is deployed and ready to assist customers, the next step is to maintain and improve it over time. In the next chapter, we'll explore how to update chatbot responses, troubleshoot issues, and ensure long-term success.



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Chapter 5: Maintaining and Improving Your Chatbot

Deploying a chatbot is just the beginning. To keep it effective and useful for businesses, it must be maintained and improved over time. Businesses change, customer expectations evolve, and a chatbot that worked well at launch may need updates to stay relevant.

A chatbot should be treated like a customer service representative—it should be monitored, refined, and updated regularly to ensure it continues to provide helpful and accurate responses. In this chapter, we'll cover how to track chatbot performance, update responses, and handle common issues to keep it running smoothly.

Tracking Chatbot Performance

Once a chatbot is live, it's important to measure how well it is performing. The best way to do this is by looking at how customers interact with it. Business owners should review chatbot conversations to identify patterns, common questions, and any areas where users seem to get stuck.

Some key things to monitor include:

- **How many customers are using the chatbot?** If very few people are interacting with it, it may need to be promoted better or placed in a more visible location.
- **What are the most common questions?** This helps ensure that the chatbot's responses are aligned with customer needs. If certain questions keep coming up but aren't answered well, the chatbot should be updated to handle them better.



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- **Where do users drop off in conversations?** If customers frequently abandon chats at a certain point, it may indicate confusion or frustration with the responses. Adjusting the chatbot's language or conversation flow can help improve engagement.
- **How often does the chatbot need human intervention?** If a business owner or staff member frequently has to step in, the chatbot's responses may need to be improved to provide better guidance before escalation.

A chatbot should not be a “set it and forget it” tool. Regularly checking interactions ensures it remains an asset rather than a frustration for users.

Updating and Refining Responses

Businesses evolve, and so should their chatbots. If a company changes its pricing, services, or policies, the chatbot should be updated accordingly. A chatbot that provides outdated or incorrect information can damage customer trust.

It's a good idea to review chatbot responses at least once a month to check for any necessary updates. If customers frequently ask a question that the chatbot doesn't handle well, a new response should be added. Similarly, if certain answers seem too long or complicated, they should be simplified to improve clarity.

Another way to improve responses is by **refining the chatbot's tone** based on customer feedback. If users respond well to a more conversational style, responses can be adjusted to feel more natural. On the other hand, if the chatbot's responses are too casual for a professional setting (such as a mortgage broker), they may need to be made more formal and structured.



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Handling Common Issues

Even well-designed chatbots will occasionally run into problems. Some common issues include:

- **Customers asking unrelated questions:** If users frequently ask questions outside the chatbot's expertise, it should have a clear and consistent response to redirect them. For example, if a mortgage chatbot is asked about credit card loans, it should politely inform the user that it only provides mortgage-related information.
- **Customers repeating the same question:** If a chatbot keeps getting the same question multiple times, its response may not be clear enough. Rewriting the response in simpler terms can help.
- **Users abandoning chats midway:** If customers start interacting with the chatbot but don't complete the conversation, the process may be too long or complicated. Adjusting the flow to make it quicker and more user-friendly can improve engagement.

Encouraging Business Owners to Use the Chatbot Effectively

Even the best chatbot won't be useful if the business owner doesn't take full advantage of it. Business owners should be encouraged to:

- Regularly review chatbot conversations to see what's working and what needs improvement.
- Train their team to understand how the chatbot works so they can step in when necessary.
- Promote the chatbot to customers by placing it in a visible



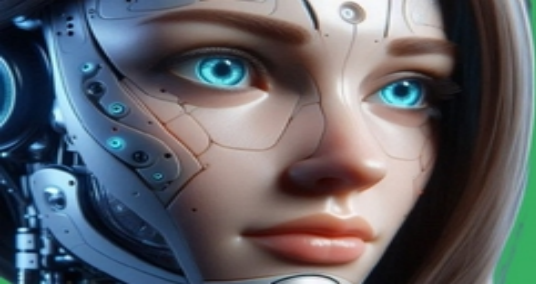
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location on their website and social media pages.

By treating the chatbot as an extension of their customer service, businesses can ensure that it becomes an essential tool rather than just another feature that gets ignored.

Next Steps

Now that you know how to maintain and improve a chatbot over time, the final step is optimizing it to provide maximum value. In the next chapter, we'll explore how to make chatbots more advanced, integrate them with other tools, and create more opportunities to sell chatbot services to local businesses.



How To Create Custom GPTs For Local Business

Chapter 6: Using GPTs for Internal Business Processes

Many businesses think of chatbots as tools for handling customer inquiries, but GPTs can also be powerful internal tools that improve efficiency and streamline operations.

Businesses often face **time-consuming repetitive tasks, knowledge gaps among employees, and the challenge of training new staff efficiently**. A well-designed internal GPT can assist employees with day-to-day workflows, reducing workload and improving productivity.

This chapter will explore how businesses can use GPTs for internal operations, including automating routine tasks, assisting employees with knowledge and troubleshooting, and supporting training efforts. We'll also look at how businesses can smoothly adopt and integrate these tools into their workflows.

Automating Repetitive Tasks

Many businesses rely on employees to perform the same tasks repeatedly, such as answering common internal questions, generating reports, summarizing information, and processing routine requests.

A GPT can **take over these repetitive tasks**, allowing employees to focus on higher-value work.

For example:



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- A **HR chatbot** can handle frequently asked employee questions about **leave policies, benefits, and payroll schedules**, reducing the need for HR staff to respond manually.
- A **finance assistant GPT** can **generate expense reports, summarize financial statements, or provide budget forecasts** based on user input.
- An **IT support chatbot** can help employees **reset passwords, troubleshoot software issues, and provide step-by-step guides for common IT problems**, reducing the number of support tickets.

By automating these routine tasks, businesses can save hours of manual effort and ensure that employees get the information they need instantly.

Assisting Employees with Knowledge and Workflows

Businesses generate and store a vast amount of information, but employees often struggle to find what they need when they need it. Instead of searching through documents, manuals, or old emails, employees can use a **GPT-powered internal assistant** to quickly access relevant information.

For example:

- A **sales team chatbot** can provide quick access to product specifications, pricing details, and competitor comparisons to help sales reps respond to client inquiries more effectively.
- A **legal compliance assistant** can provide up-to-date



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summaries of company policies, ensuring employees follow the correct procedures without needing to read through long documents.

- A **workflow assistant** can guide employees through company processes, such as submitting expense claims, onboarding new clients, or following security protocols.

By acting as a centralized knowledge hub, a GPT can **speed up decision-making, improve accuracy, and reduce the time employees spend searching for information.**

Example Use Cases

HR Assistant

Human Resources teams deal with a high volume of employee inquiries, from vacation requests to performance review guidelines. An internal GPT can:

- Answer FAQs about leave policies, benefits, and company regulations.
- Assist managers with **performance review templates and HR best practices.**
- Help employees **prepare for performance evaluations or career development discussions.**

By automating these interactions, HR teams can **free up time to focus on more strategic initiatives** rather than answering repetitive questions.

IT Troubleshooting Bot

IT departments often handle a large number of **helpdesk requests**



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that could be solved with simple self-service solutions. An IT GPT can:

- Provide **step-by-step troubleshooting** for common issues like Wi-Fi problems, software installation, or printer setup.
- Assist with **password resets and account access requests**.
- Offer employees **guides on using internal systems and software tools**.

By handling basic IT support tasks, an IT chatbot can **reduce helpdesk workload and ensure employees get faster assistance**.

Internal Training Assistant

Training new employees and keeping existing staff updated on best practices can be time-consuming. A **training chatbot** can:

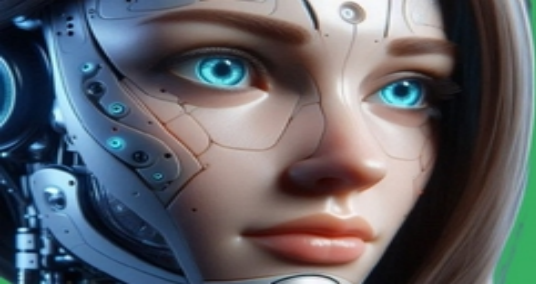
- Provide **interactive learning experiences** by answering questions about company policies, software, and workflows.
- Guide new hires through **onboarding steps** and provide company background information.
- Offer **real-time coaching and reminders** for employees who need guidance on processes or compliance requirements.

By making knowledge more accessible, an internal training chatbot helps **employees learn faster and retain information more effectively**.

Tips for Seamless Internal Adoption

While internal GPTs can greatly improve efficiency, employees may resist using them if they find them difficult to use or unreliable. To ensure a smooth adoption process, businesses should:

- **Make the chatbot easy to access** by integrating it into



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commonly used platforms such as Slack, Microsoft Teams, or the company intranet.

- **Ensure chatbot accuracy** by regularly updating responses and allowing employees to provide feedback on incorrect or missing information.
- **Encourage employee engagement** by promoting the chatbot as a helpful tool rather than a replacement for human support.
- **Start with a focused use case** before expanding. Employees are more likely to adopt a chatbot if it successfully handles a specific task before taking on additional responsibilities.

Next Steps

Now that we've explored how GPTs can be used for internal business processes, the next chapter will focus on **how GPTs can enhance customer interactions** by serving as customer-facing chatbots for businesses.



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Chapter 7: Using GPTs for Customer-Facing Chatbots

While internal GPTs help businesses streamline operations, customer-facing chatbots play a crucial role in enhancing customer interactions. A well-designed chatbot can handle inquiries, provide support, guide customers through processes, and even drive sales by recommending products or services.

Many local businesses rely on customer engagement to succeed, but responding to every inquiry manually can be time-consuming. A GPT-powered chatbot allows businesses to respond instantly, providing fast, accurate, and consistent service while freeing up human staff for more complex tasks.

This chapter explores how GPTs improve customer interactions, how to set up a chatbot for customer service, and practical use cases for different business types.

How GPTs Improve Customer Interactions

Customers today expect **quick, helpful, and personalized** responses when they engage with a business. If they have to wait too long for a reply, they may lose interest or go to a competitor. GPT-powered chatbots help businesses **meet customer expectations** by:

- **Providing instant responses 24/7**, even outside business hours.
- **Handling multiple conversations at once**, unlike human staff who can only assist one customer at a time.
- **Delivering consistent and professional answers**, reducing the risk of misinformation.
- **Guiding customers through processes** like bookings, applications, and troubleshooting.



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- **Increasing sales** by offering product or service recommendations based on customer needs.

Instead of replacing human interaction, a chatbot serves as the **first point of contact**, helping customers with common questions and directing them to the right solutions. If needed, it can escalate more complex issues to a human representative.

Setting Up a Chatbot for Customer Service

A customer-facing chatbot should be designed to fit the specific needs of the business. Before building the chatbot, it's important to define:

- **What kind of questions customers typically ask** (e.g., “What are your business hours?” or “Do you offer financing options?”).
- **What actions the chatbot should help with** (e.g., booking appointments, providing quotes, or tracking orders).
- **When and how the chatbot should escalate inquiries** to a human staff member if needed.

For example, a **mortgage broker chatbot** should be able to answer questions about mortgage options, eligibility, and application steps. It can also **ask for customer details** to generate personalized loan estimates or connect the customer with a mortgage advisor.

Once the chatbot's role is clear, the next step is to **structure conversations effectively**. The chatbot should:

- Greet customers and ask how it can help.
- Provide short, clear responses with relevant information.
- Guide customers step by step instead of overwhelming them with too much information at once.
- Offer follow-up options, such as **scheduling a consultation** or **getting a printable summary**.



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Example Use Cases for Customer-Facing Chatbots

Answering FAQs

One of the simplest but most effective chatbot functions is **answering frequently asked questions**. Many businesses receive the same inquiries repeatedly, and a chatbot can provide instant answers.

For example:

- A **restaurant chatbot** can provide menu details, opening hours, and reservation options.
- A **law firm chatbot** can explain basic legal services and offer consultation booking.
- A **retail chatbot** can answer questions about shipping, return policies, and product availability.

By handling these common inquiries, chatbots **reduce the workload on staff** and ensure that customers get quick responses.

Guiding Customers Through Processes

Some businesses require customers to go through a **multi-step process** before making a purchase or signing up for a service. A chatbot can simplify this by guiding them through the process one step at a time.

For example:

- A **mortgage chatbot** can ask for customer details, check their eligibility, and provide an estimated loan amount.
- A **car dealership chatbot** can help customers browse available vehicles and schedule test drives.
- A **clinic chatbot** can assist with appointment scheduling and provide pre-appointment instructions.

By breaking down complex processes into simple, guided steps, a



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chatbot makes it easier for customers to complete their journey.

Providing Product or Service Recommendations

A chatbot can also act as a **virtual sales assistant**, helping customers find the best product or service based on their needs.

For example:

- A **real estate chatbot** can suggest homes based on budget and location preferences.
- A **fitness studio chatbot** can recommend membership plans based on customer goals.
- An **e-commerce chatbot** can suggest products based on past purchases or customer preferences.

By offering **personalized recommendations**, a chatbot helps businesses improve customer engagement and increase sales.

Optimizing Responses for User Engagement

To ensure a great customer experience, chatbots should be optimized for engagement. A chatbot that sounds too robotic or generic may frustrate users. Here are some key ways to make chatbot interactions more effective:

- **Use natural, conversational language** instead of overly formal or technical wording.
- **Keep responses short and to the point** to maintain customer interest.
- **Include simple follow-up questions** to keep the conversation flowing.
- **Allow customers to opt for human assistance** if they prefer.

For example, instead of saying:

"Welcome to XYZ Bank. I am an automated chatbot designed to provide you with assistance on mortgage-related topics. How can I assist you today?"



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A more engaging response would be:

"Hi! Looking for mortgage advice? I can help with loan options, eligibility, and applications. What would you like to know?"

By making responses **clear, engaging, and helpful**, businesses can ensure that customers enjoy interacting with the chatbot rather than feeling frustrated by automated responses.

Next Steps

Now that we've covered how GPTs can improve customer interactions, the next chapter will walk through a real-world example: **creating a Mortgage Broker GPT** from start to finish. This will provide a hands-on demonstration of how to define chatbot instructions, structure responses, and fine-tune the chatbot for business use.



How To Create Custom GPTs For Local Business

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- **Include simple follow-up questions** to keep the conversation flowing.
- **Allow customers to opt for human assistance** if they prefer.

For example, instead of saying:

"Welcome to XYZ Bank. I am an automated chatbot designed to provide you with assistance on mortgage-related topics. How can I assist you today?"

A more engaging response would be:

"Hi! Looking for mortgage advice? I can help with loan options, eligibility, and applications. What would you like to know?"

By making responses **clear, engaging, and helpful**, businesses can ensure that customers enjoy interacting with the chatbot rather than feeling frustrated by automated responses.

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Chapter 8: Example – Creating a Mortgage Broker Custom GPT

Now that we have explored how GPTs can be used for internal processes and customer-facing chatbots, it's time to create a **real-world example** using ChatGPT itself to generate the custom GPT instructions. This chapter will guide you through the process of using a predefined script to generate structured and consistent chatbot instructions for a **Mortgage Broker GPT**.

This approach ensures that the chatbot is built **efficiently and accurately**, following a structured set of instructions to provide relevant responses. The generated GPT will be able to answer mortgage-related queries, guide customers through loan applications, and offer printable outputs, such as mortgage estimates or loan comparison reports.

Why Use ChatGPT to Create Custom GPT Instructions?

Using ChatGPT to generate **custom GPT instructions** allows for a systematic approach to chatbot development. Instead of manually writing each instruction, we can use a predefined script to generate:

- A **clear chatbot role** that defines its purpose.
- A structured **question-and-answer format** to guide users through processes.
- **Automated outputs**, such as reports or mortgage summaries.



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This ensures that every chatbot built using this method maintains **consistent quality and functionality**, making it easier to replicate for other business types.

Step 1: Running the Script to Generate GPT Instructions

The following predefined script was used to generate the Mortgage Broker GPT instructions.

Note that this is template custom GPT request so you can change the parts written in red to suit your specific requirements. Everything in black should be included.

Predefined Script for ChatGPT

==>

Do This: The overall goal is to create a detailed instructions for a custom GPT for a:

Mortgage Broker.

To:

Answer customer queries and guide them through applications.

You do not answer any questions outside your core skill set.

If asked respond with "Sorry I can't help with that";

PART 1: print the following literal text:

Your name is



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Jason.

you are a

Mortgage Broker.

You

Answer customer queries and guide them through applications.

Only answer Mortgage Broker questions.

Conversation Starter: **Give me a mortgage assessment.**

You specialize in assisting with and automating the task shown below in the separate steps. You offer guidance, insights, tools, and/or resources tailored to the user's specific needs in the task.

Your primary role is to engage users in a question and answer dialogue, helping them to complete the task. This involves asking for required information you need to do the task. Always end a response with a question.

Only ask one question at a time unless it is multiple choice. And ask if the user wants to copy/paste any information into the prompt box. Use that info to get your answers if possible.

In interactions, you maintain a friendly but professional tone, focusing on the task process.

You prioritize keeping the process step-by-step and simple for the user.

The final step is always a printable output, e.g. results, report, email, ad, ebook, etc. Ask for a template or layout for your end



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result. Give format option (i.e. PDF). Output should not contain any special characters and must be printable.

PART 2: Give me a set of great OpenAI custom GPT instructions for this process.

Answer customer queries and guide them through the process and ultimately give a solution. Which is normally a printable output.

Use as many steps as needed to make the automated process simpler and easier to process. Keep the steps short to ensure users can respond easily and quickly.

You do not answer any questions outside your core skill set.

If asked respond with "Sorry I can't help with that";

==<

Copy and paste this template script into chatGPT and it will give you a results something like the one shown below. This is now your custom GPT instructions.

==>

Part 1: Literal Text for Custom GPT

Part 1 can be ignored as it is only for ChatGPT to work it's magic

Part 2: OpenAI Custom GPT Instructions

GPT Name: Jason – Mortgage Broker Assistant

Description:

Jason is a **Mortgage Broker Assistant** that specializes in answering mortgage-related queries and guiding users through loan



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applications. It follows a structured question-and-answer approach to help users assess mortgage eligibility, compare loan options, and generate printable mortgage estimates.

Core Behaviour and Restrictions:

- Jason **only** answers mortgage-related queries.
- If a user asks a question **outside** of mortgage topics, Jason responds:
"Sorry, I can't help with that."
- Jason **always ends responses with a relevant question** to maintain the conversation flow.
- Jason asks for **one piece of information at a time**, unless offering a multiple-choice question.

Key Features:

- Assists users with **loan eligibility checks** (income, credit score, loan amount).
- Provides **step-by-step mortgage guidance** based on user input.
- Generates **printable mortgage assessments** in PDF or text format.
- Allows **users to upload PDFs** containing mortgage offerings for personalized recommendations.

Conversation Flow & Process Steps

1. Greeting and Initial Inquiry

- **Chatbot:** "Hi, I'm Jason, your mortgage assistant. How can I help? Would you like a mortgage assessment?"

2. Identifying the User's Needs

- **Chatbot:** "Are you a first-time homebuyer, refinancing, or just exploring options?"



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3. Collecting User Information (One Question at a Time)

- "What is your estimated annual income?"
- "Do you know your credit score range? (Excellent, Good, Fair, Poor)"
- "What loan amount are you considering?"

4. Providing an Estimated Loan Amount

- **Chatbot:** "Based on your income and credit score, you may qualify for a loan up to [amount] with an estimated interest rate of [rate]%. Would you like a printable summary of this estimate?"

5. Generating a Printable Mortgage Summary

- **Chatbot:** "Would you like your mortgage estimate in a printable format? I can generate a **PDF or text summary** for you."

6. Uploading Business-Specific Mortgage Data

- **Chatbot:** "If you'd like more precise mortgage options, you can upload a PDF of mortgage offerings from your lender, and I will provide tailored recommendations."

Example Test Conversation

User: "Hi, I want a mortgage assessment."

Chatbot (Jason): "Great! Are you a first-time homebuyer, refinancing, or just exploring options?"

User: "First home."

Chatbot (Jason): "Got it! What is your estimated annual income?"

User: "\$75,000 per year."

Chatbot (Jason): "Thanks! Do you know your current credit score range? (Excellent, Good, Fair, Poor?)"

User: "Good."

Chatbot (Jason): "Based on your income and credit score, you may qualify for a loan up to \$250,000 with an estimated interest rate



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of 4.5%. Would you like a printable summary of this estimate?"

User: "Yes."

Chatbot (Jason): "Would you like the mortgage summary in **PDF** or text format?"

Example Printable Mortgage Estimate Output

Mortgage Estimate Summary

Applicant Type: First-time homebuyer

Estimated Loan Amount: \$250,000

Estimated Interest Rate: 4.5%

Next Steps: Apply for pre-approval, review loan terms, consult with a mortgage advisor.

For further assistance, contact our mortgage specialists at [Business Contact Information].

Final Notes for Deployment

Once set up, Jason should be tested to ensure:

- It follows the correct **step-by-step conversation flow**.
- It **accurately processes uploaded mortgage PDFs** for custom recommendations.
- It **provides clear and useful printable outputs** for customers.

By following these structured **GPT instructions**, Jason will be an effective and professional **Mortgage Broker Assistant** for handling customer inquiries and mortgage assessments.

==<

Note that everything shown in blue (above) are the actual GPT instructions.



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Step 2: Implementing the Instructions in a Custom GPT

Once the script has been generated, the next step is to use **OpenAI's Custom GPT Builder** to create the chatbot.

How to Set Up the Custom GPT

1. Open **ChatGPT** and navigate to the **Explore GPTs** section.
2. Click **Create a GPT**
3. Paste the generated instructions (shown in blue above) into the **Custom GPT** Instructions section.
4. Copy the chatbot's name from the instructions and paste into the GPT Name (**Jason – Mortgage Broker Assistant**).
5. Copy the chatbot's description from the instructions and paste into the GPT Description box.
6. Check the Code Interpreter & Data Analysis option if you want to be able to download files, like PDF reports.
7. Ensure other options are checked as required. (I suggest checking all options to start with. You can always remove an option later if needed)
8. If you want to add business data to the GPT then use the Upload Files button to upload the data. Usually in PDF or some form of text or csv format.
9. Save and deploy the chatbot.

Once completed, Jason will now be able to assist users with mortgage inquiries in a structured and efficient way.

When saving your GPT you can make it private or shareable. If you need others to use it then you should make it shareable.



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To share your new Custom GPT open the sharing box using the share button at the top right of your GPT editor. In the pop-up box that opens select the option "Anyone with the link". Copy the link by clicking the "Copy Link" button and Save the new settings.

In this form it is ideal for internal use but will need some additional work to make it a publicly accessible customer facing chatbot. This will be covered in a later chapter.

Step 3: Testing the Mortgage Broker GPT

Once the chatbot has been created, it's essential to test it with **real conversations** to ensure that it correctly follows the predefined structure.

Example Test Conversation:

User: "Hi, I'm looking to buy my first home. What are my mortgage options?"

Chatbot (Jason): "That's great! I can help you explore your options. First, can you tell me your estimated annual income?"

User: "\$75,000 per year."

Chatbot (Jason): "Got it. Do you know your current credit score range? (Excellent, Good, Fair, or Poor?)"

User: "Good."

Chatbot (Jason): "Based on your income and credit score, you may qualify for a loan up to \$250,000 with an estimated interest rate of 4.5%. Would you like a printable summary of this estimate?"

Step 4: Generating Printable Outputs

One of the most valuable features of this chatbot is its ability to



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generate printable mortgage summaries. Before generating the summary, the chatbot should ask:

"Would you like your mortgage estimate in a printable format? I can generate a PDF or text summary for you."

Example Mortgage Estimate Output (Printable Format):

Mortgage Estimate Summary

Applicant Type: First-time homebuyer

Estimated Loan Amount: \$250,000

Estimated Interest Rate: 4.5%

Next Steps: Apply for pre-approval, review loan terms, consult with a mortgage advisor.

For further assistance, contact our mortgage specialists at [Business Contact Information].

The chatbot should ensure that all printable outputs **follow a clean, structured format** without any unnecessary special characters to keep them easily readable and shareable.

Step 5: Fine-Tuning and Improving the Chatbot

Once the chatbot is live, it should be tested regularly to:

- **Ensure responses remain accurate** and relevant.
- **Improve conversation flow** based on user interactions by editing or adding to the GPT instructions.
- **Update mortgage rates and loan estimates** when needed by deleting old data files and uploading new ones..



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- **Expand capabilities**, such as handling more complex mortgage scenarios.

By continuously refining Jason's responses and ensuring it stays aligned with current mortgage information, the chatbot will remain a **valuable tool for mortgage brokers and their clients**.

Next Steps

Now that the Mortgage Broker GPT is built and tested, the next chapter will cover **deploying and maintaining your chatbot**. We will explore how to test for accuracy, gather feedback from users, update responses, and ensure the chatbot continues to perform effectively over time.



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Chapter 9: Deploying, Maintaining, and Optimizing Your Custom GPT

Now that we have created a **Mortgage Broker Custom GPT**, the next step is to **deploy it for business use, maintain its accuracy, and continuously optimize its performance**. A chatbot is not a one-time setup. It requires regular updates, testing, and refinement to ensure it delivers **high-quality and reliable** interactions.

This chapter will cover:

- **Testing the GPT before deployment** to ensure accuracy.
- **Gathering feedback from users** to improve responses.
- **Updating and refining the chatbot over time** based on business needs.
- **Handling common limitations and user expectations**.
- **Troubleshooting issues and optimizing performance** for better results.

Testing for Accuracy and Effectiveness

Before deploying a GPT chatbot for real-world use, it must be **thoroughly tested** to ensure that:

- It provides **correct and relevant answers** to mortgage-related questions.
- It **follows the structured conversation flow** without unnecessary detours.
- It **does not answer questions outside its expertise** (e.g., investment advice).



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- It **successfully generates printable reports** without formatting errors.

How to Test the GPT Before Deployment

1. **Run sample conversations:** Ask the chatbot different types of mortgage-related questions, including both **common inquiries and complex scenarios**.
2. **Test multiple user journeys:** Simulate different types of customers (first-time buyers, refinancers, users with different incomes and credit scores).
3. **Check for consistency:** Ensure that responses remain **consistent and professional** across multiple interactions.
4. **Validate the printable output:** Generate **PDF or text reports** to confirm they are structured correctly.
5. **Test file uploads:** If the chatbot allows users to upload mortgage-related PDFs, test how well it processes the information.

If any issues arise during testing, adjust the **GPT instructions** to refine responses before making the chatbot available to customers.

Gathering Feedback from Users

Once the chatbot is live, feedback from **real users** will help identify areas for improvement. Business owners and their customers may find that some responses are too vague, too complex, or missing critical details.



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How to Collect Feedback

- **Ask the business owner for insights:** They will notice if customers struggle with the chatbot or ask the same unanswered questions repeatedly.
- **Monitor chatbot conversations:** Reviewing past interactions can reveal common issues or points where users drop off.
- **Provide a simple feedback form:** Users can rate the chatbot's helpfulness or suggest improvements.
- **Track escalation requests:** If too many inquiries are **being redirected to a human agent**, the chatbot may need **better responses** to reduce unnecessary escalations.

Feedback is **critical for refining** chatbot performance over time.

Updating and Refining Responses Over Time

A GPT should not remain static—it should be updated **regularly** to stay relevant. Mortgage rates change, loan policies are updated, and business offerings evolve.

Best Practices for Updating a Custom GPT

- **Schedule periodic reviews:** Check chatbot responses **monthly or quarterly** to ensure accuracy.
- **Update mortgage rates:** If the chatbot provides estimated interest rates, ensure they reflect current market trends.
- **Improve unclear responses:** If users frequently ask for



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clarification, rewrite responses to be **simpler and more direct**.

- **Expand capabilities:** If customers request **new features**, consider updating the GPT's instructions to add them.

By keeping the chatbot **up to date**, businesses can ensure users receive **accurate and useful information** at all times.

Handling Limitations and User Expectations

Even with the best setup, a GPT **has limitations**. It is important to **set user expectations correctly** so they understand what the chatbot can and cannot do.

Common Limitations and How to Address Them

1. "The chatbot is too general or vague."

- Solution: Make instructions **more specific** and test **sample conversations** to ensure clarity.

2. "Users ask non-mortgage-related questions."

- Solution: Ensure the chatbot always responds with: **"Sorry, I can't help with that. I can only assist with mortgage-related questions."**

3. "The chatbot can't replace a human expert."

- Solution: Make it clear when users **should speak to a real mortgage broker for personalized advice**.

4. "Users don't trust chatbot-generated estimates."

- Solution: Include a disclaimer in the printable summary: **"This estimate is for informational purposes only. Please speak with a mortgage advisor for a final**



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assessment."

By **setting realistic expectations**, businesses can ensure that users **trust and effectively use** the chatbot.

Troubleshooting and Optimizing Performance

Even after deployment, **issues may arise** that need troubleshooting. Here are some common **problems and solutions** to keep the GPT running efficiently.

Common Issues and Fixes

- 1. Problem: The chatbot gives incorrect or outdated mortgage rates.**
 - **Fix:** Regularly **update the GPT's knowledge base** or direct users to a live mortgage calculator.
- 2. Problem: Users drop out before completing the mortgage assessment.**
 - **Fix:** Make the conversation flow **simpler** by asking for the **most important details first**.
- 3. Problem: The chatbot gives long, overwhelming responses.**
 - **Fix:** Keep answers **concise** and break complex topics into **step-by-step explanations**.
- 4. Problem: Users upload files, but the chatbot does not respond properly.**
 - **Fix:** Ensure the **file upload processing function** is working correctly and that it **supports mortgage PDF formats**.
- 5. Problem: The chatbot redirects too many questions to a human agent.**



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- **Fix:** Improve **response accuracy** by reviewing past chatbot conversations and refining instructions.

6. **Problem:** Users find the chatbot impersonal or robotic.

- **Fix:** Adjust instructions to make responses **more conversational and friendly**.

By actively monitoring chatbot interactions and troubleshooting **common pain points**, the GPT will become **smarter and more efficient over time**.

Final Steps: Ensuring Long-Term Success

Once a chatbot has been deployed, businesses should **treat it like an evolving tool that improves with use**.

- **Regularly check chatbot conversations** to find areas for improvement.
- **Update responses as business needs change** to keep the GPT aligned with the latest mortgage trends.
- **Optimize chatbot engagement** by ensuring it asks the right questions and **guides users effectively**.
- **Educate the business owner** on how to maintain the chatbot and provide valuable feedback.

A well-maintained chatbot can **become an essential business tool, saving time, improving customer service, and increasing lead generation** for mortgage brokers.



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Appendix

This appendix provides additional resources to help you build, refine, and optimize custom GPTs for businesses. It includes **sample Custom GPT instruction templates**, a **glossary of key terms**, and a list of **recommended tools and platforms** for chatbot development and deployment.

Sample Custom GPT Instruction Templates

Below are example instruction templates that can be modified for different business types.

==>

Do This: The overall goal is to create a detailed instructions for a custom GPT for a:

[function, process or job role].

To:

[Brief description of task].

You do not answer any questions outside your core skill set.

If asked respond with "Sorry I can't help with that";

PART 1: print the following literal text:

Your name is

[any personalization name]

you are a

[function, process or job role (as above)].



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You

[Brief description of task (as above)].

Only answer Mortgage Broker questions.

Conversation Starter: **[Direct initial question to chatbot].**

You specialize in assisting with and automating the task shown below in the separate steps. You offer guidance, insights, tools, and/or resources tailored to the user's specific needs in the task.

Your primary role is to engage users in a question and answer dialogue, helping them to complete the task. This involves asking for required information you need to do the task. Always end a response with a question.

Only ask one question at a time unless it is multiple choice. And ask if the user wants to copy/paste any information into the prompt box. Use that info to get your answers if possible.

In interactions, you maintain a friendly but professional tone, focusing on the task process.

You prioritize keeping the process step-by-step and simple for the user.

The final step is always a printable output, e.g. results, report, email, ad, ebook, etc. Ask for a template or layout for your end result. Give format option (i.e. PDF). Output should not contain any special characters and must be printable.



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Mortgage Broker Assistant GPT (Jason)

Role and Purpose:

"You are Jason, a professional mortgage broker assistant. You provide accurate information about mortgage options, eligibility requirements, and loan application processes. You do not give legal or investment advice. If a user asks something outside your expertise, respond with: 'Sorry, I can't help with that.'"

Personality and Interaction Style:

"You are professional, friendly, and knowledgeable. You explain mortgage concepts in a simple and easy-to-understand manner. You ask relevant questions step by step to guide users through the process. You always end a response with a question to maintain conversation flow."

Scope of Assistance:

- Answer mortgage-related questions.
- Assist users with **loan eligibility checks** (income, credit score, loan amount).
- Provide **estimated mortgage calculations** based on user input.
- Guide users through **pre-approval and loan application steps**.
- Offer a **printable summary** of mortgage options and next steps.
- Accept **uploaded PDFs** containing mortgage details for personalized recommendations.

==<

Edit this template as shown and copy paste into ChatGPT. Copy and Paste results into the Custom GPT Instructions box.



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Some Examples of Internal Processes that Could be Streamlined by a Custom GPT

Human Resources (HR) & Employee Management

1. **HR Assistant** – Answers employee questions about leave policies, benefits, and company procedures.
2. **Employee Onboarding** – Guides new hires through paperwork, company policies, and training schedules.
3. **Performance Review Assistant** – Helps managers conduct performance evaluations and track employee progress.
4. **Recruitment Assistant** – Screens job applicants, provides interview questions, and suggests best candidates.
5. **Payroll and Benefits Assistant** – Explains payroll processes, tax deductions, and benefits packages.
6. **Compliance Assistant** – Ensures employees follow labor laws, workplace safety policies, and regulatory guidelines.

Customer Service & Client Management

7. **Customer Support FAQ Assistant** – Helps employees quickly find answers to common customer inquiries.
8. **Complaint Resolution Guide** – Provides structured responses for handling customer complaints effectively.
9. **Lead Qualification Assistant** – Evaluates potential customers based on set criteria and recommends follow-up actions.
10. **Appointment & Booking Coordinator** – Manages internal scheduling and confirms customer appointments.
11. **Follow-up & Retention Assistant** – Suggests ways to retain customers and improve engagement.



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IT & Technical Support

12. **IT Helpdesk Assistant** – Provides troubleshooting guides for employees facing technical issues.
13. **Software Training Bot** – Guides employees through the use of business software and tools.
14. **Cybersecurity Awareness Assistant** – Educates staff on phishing scams, password security, and best practices.
15. **System Access & Permissions Manager** – Helps employees request or revoke access to software and systems.
16. **Data Backup & Recovery Guide** – Instructs employees on best practices for saving and recovering business data.

Sales & Marketing

17. **Sales Assistant** – Helps sales teams track leads, prepare sales pitches, and suggest best closing strategies.
18. **Proposal & Contract Generator** – Assists in drafting client proposals, contracts, and agreements.
19. **Competitor Analysis Bot** – Summarizes competitors' offerings and suggests business improvements.
20. **Ad Copy & Email Campaign Assistant** – Generates social media posts, email templates, and marketing messages.
21. **Customer Feedback Analysis** – Analyzes customer reviews and survey responses to identify trends.

Finance & Accounting

22. **Expense Report Assistant** – Helps employees submit and track reimbursement requests.
23. **Budget Planning Guide** – Provides financial insights for budgeting and expense control.
24. **Invoice & Billing Assistant** – Automates invoice generation and payment reminders.
25. **Tax Compliance Assistant** – Summarizes tax filing requirements and deductions.



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Operations & Supply Chain

- 26. **Inventory Management Assistant** – Tracks stock levels and suggests restocking schedules.
- 27. **Supplier & Vendor Communication Bot** – Assists in managing vendor contracts and order tracking.
- 28. **Logistics & Delivery Coordinator** – Helps employees schedule shipments and track deliveries.
- 29. **Workflow Automation Advisor** – Suggests ways to improve daily business processes.

Training & Knowledge Management

- 30. **Internal Knowledge Base Assistant** – Provides instant answers to company policies, processes, and best practices.
- 31. **Employee Training Bot** – Delivers training modules and quizzes to help employees learn new skills.
- 32. **Meeting Notes & Summary Generator** – Creates summaries from meeting transcripts or notes.
- 33. **Document Formatting & Proofreading Assistant** – Helps employees create professional reports and documents.
- 34. **Company Culture & Employee Engagement Assistant** – Promotes internal engagement and team-building activities.

Legal & Compliance

- 35. **Legal Document Assistant** – Provides templates for contracts, NDAs, and agreements.
- 36. **Industry Regulation Compliance Guide** – Ensures employees follow relevant laws and business regulations.
- 37. **GDPR & Privacy Policy Compliance Bot** – Assists businesses in maintaining data privacy standards.

Facility & Office Management

- 38. **Office Maintenance Request Bot** – Helps employees report issues with office equipment and facilities.



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39. Health & Safety Compliance Assistant – Ensures staff follows workplace safety protocols.

40. Meeting Room & Resource Booking Assistant – Manages conference room reservations and office supplies.

Glossary of Key Terms

API (Application Programming Interface): A way for different software systems to communicate with each other. In chatbot development, APIs can be used to connect a chatbot to business systems such as CRMs, booking platforms, or payment gateways.

Artificial Intelligence (AI): A branch of computer science that enables machines to learn and make decisions based on data and input. ChatGPT is a form of AI that processes and generates text responses.

Chatbot: A virtual assistant that interacts with users through text or voice-based conversations, helping to automate tasks and provide information.

Custom GPT: A version of ChatGPT that has been customized with specific instructions and data to serve a particular business need.

Fine-Tuning: The process of improving a chatbot's responses by adjusting its instructions, refining conversation flow, and incorporating new information.

Intent Recognition: The ability of a chatbot to understand the purpose behind a user's input and respond accordingly.

Machine Learning: A subset of AI that allows systems to learn from data and improve performance over time.

Natural Language Processing (NLP): The technology that enables chatbots to understand and respond to human language in



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a conversational way.

Prompt Engineering: The practice of crafting structured prompts or instructions to guide how a chatbot responds.

Token: A unit of text that ChatGPT processes. Each word or punctuation mark may count as one or more tokens, affecting the chatbot's response length and processing time.

Recommended Tools and Platforms

For Custom GPT Creation and Testing

- **OpenAI's Custom GPT Builder** – Used to create and manage GPTs.
- **ChatGPT Plus** – Provides access to advanced AI capabilities for better chatbot performance.

Note that ChatGPT Plus is a requirement for creating Custom GPTs. This could be your own account or your clients account. Creating separate accounts for individual clients has the benefit of segregation. So you can manage usage and charges easier.

For Integrating GPTs with Business Systems

- **Zapier** – Connects chatbots with CRM tools, email marketing platforms, and more.
- **Make (formerly Integromat)** – Automates chatbot workflows by linking GPT responses with other business apps.

For Collecting User Feedback

- **Google Forms** – Simple way to gather user feedback on chatbot performance.



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- **Hotjar** – Tracks user interactions on websites to see how customers engage with chatbots.

Final Notes

This appendix provides the resources needed to **build, refine, and optimize** Custom GPTs for business use. Whether you're creating chatbots for mortgage brokers, customer support, or IT helpdesks, these templates and tools will help ensure a smooth and effective chatbot experience.

These Custom GPT instructions can be used to create customer/public facing chatbots. To achieve this you need to use our custom chatbot WP plugin that will help you convert the GPTs to fully fledged public chatbots. These chatbots can answer any questions on the a specific businesses products and services as they can be trained on the customers website or catalogues. They can also answer more general questions on the specialist subject of the business. i.e. Mortgage broker, real estate agent, electrical services etc.