COHESION X
HARMONY IN EXPERTISE

VectorMind GenAI Prompt Guide

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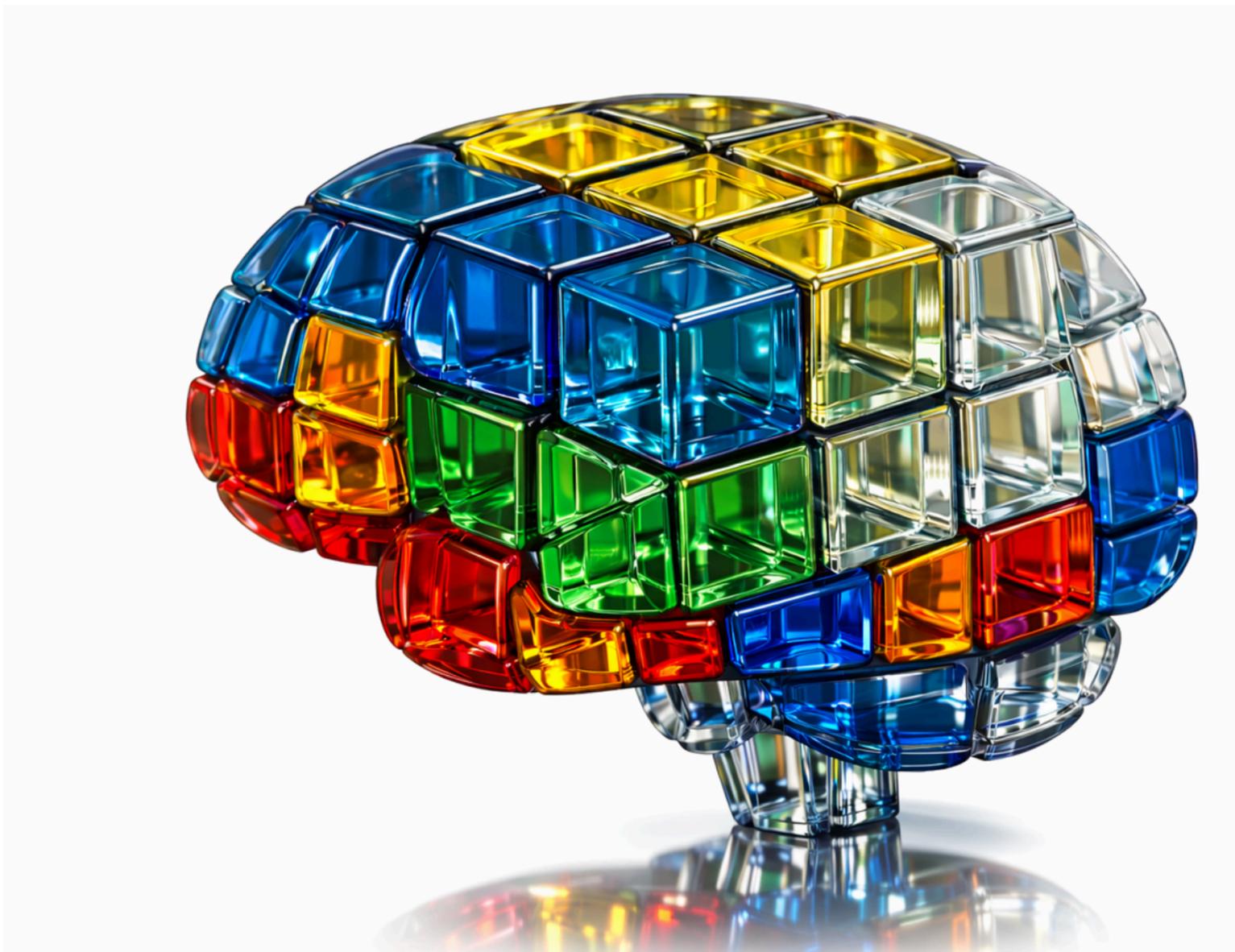
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Welcome to the Wondrous World of VectorMind AI

This guide is designed to **accelerate your VectorMind outputs**, helping users across all levels move from occasional AI users to confident, high-value prompt engineers. Whether you're working with Domain Assistants, running automated Workflows, analysing calls, or deploying Agentic solutions, the quality of your prompts directly determines the quality of your outcomes.

VectorMind can help you **solve problems, analyse data, and create innovative solutions**. It works by receiving prompts to start or modify actions.

A prompt simply is a message or a command that you give to VectorMind to tell it what you want it to do. This document will **help you get started using elevated prompts**.

Unlike public AI models, VectorMind has guardrails in place to mitigate bias, data privacy, criminal intent, drifting, hallucinations, factuality, etc., so that you don't have to add them in your prompts!

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↗ VectorMind (by CohesionX) is an enterprise-grade GenAI platform built for African and global businesses, offering a suite of intelligent tools including BusinessGPT, IRIS, Knowledge Nodes, Conversation IQ, Data Extraction, and more. All **designed to make AI practical, secure, and business ready**.

↗ It is based on **large language models (LLMs)**, overlayed securely with curated data, making it a convenient subject-matter expert.
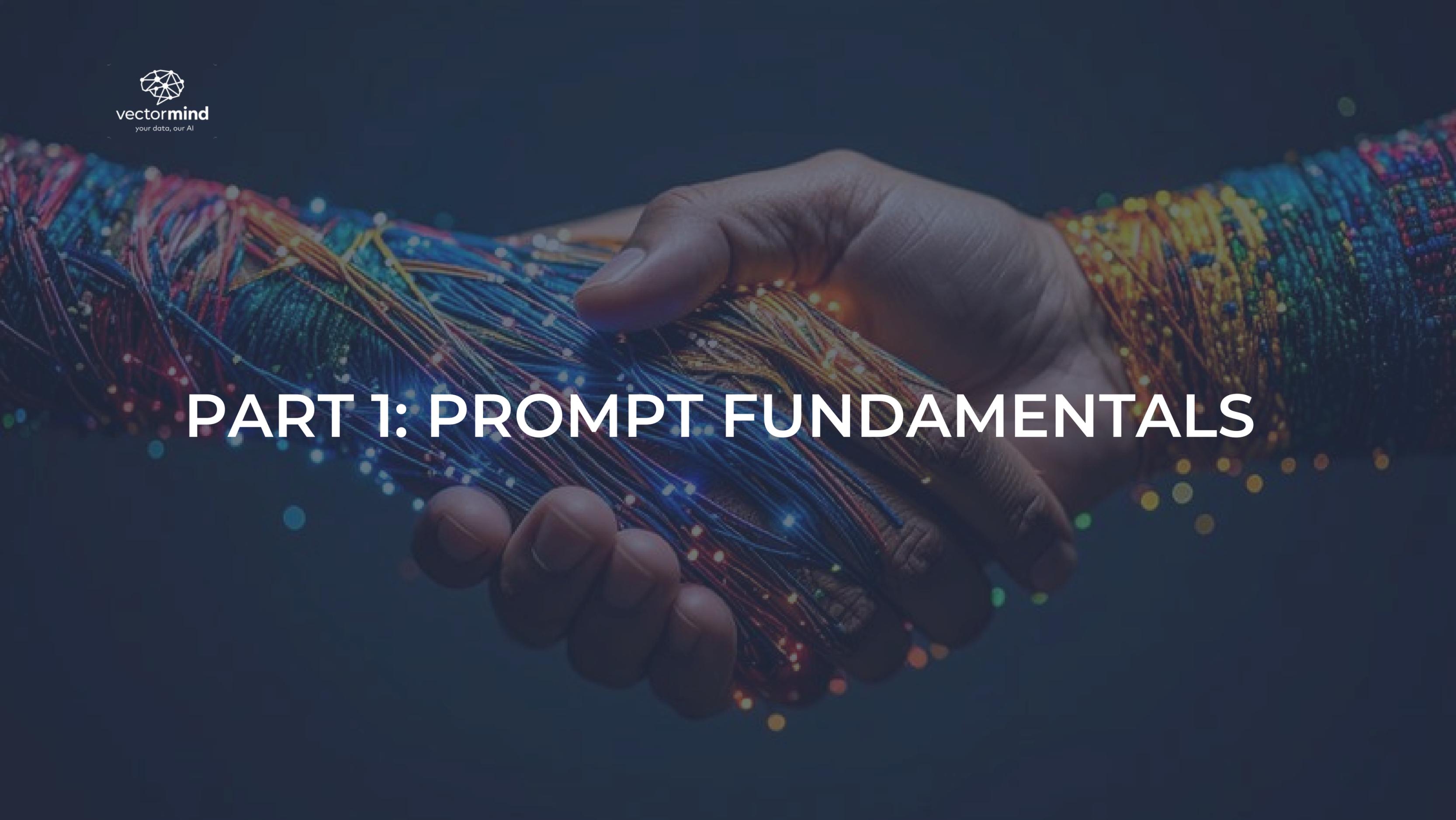
How AI Interprets Prompts

Understanding what happens inside the AI when you submit a prompt helps you craft better ones.

How AI Interprets Prompts

```
YOUR PROMPT
↓[Intent Recognition] — What is the user trying to achieve?
↓[Context Mapping] — What knowledge/data is relevant?
↓[Constraint Identification] — What rules/limits apply?
↓[Response Generation] — Structured, ranked output
↓YOUR RESULT
```

Key Principles of AI Interpretation

Principle	What It Means	What It Means
Literal Processing	AI takes your words at face value	Vague input = vague output
Context Dependency	AI uses all text in the prompt as context	More relevant context = better answers
Pattern Matching	AI recognises structural cues	Structured prompts yield structured results
Probabilistic Output	AI predicts the most likely helpful response	Specificity guides probability toward your goal
No Mind Reading	AI cannot infer what you left unsaid	State your assumptions explicitly

The Garbage In / Gold Out Principle

```
❌ WEAK PROMPT:
"Tell me about our sales"


✅ STRONG PROMPT: "Summarise the document's Q3 2024 sales performance for the Johannesburg region,
highlighting top 3 performing products and any declining SKUs, in bullet point format for a
management report."
```
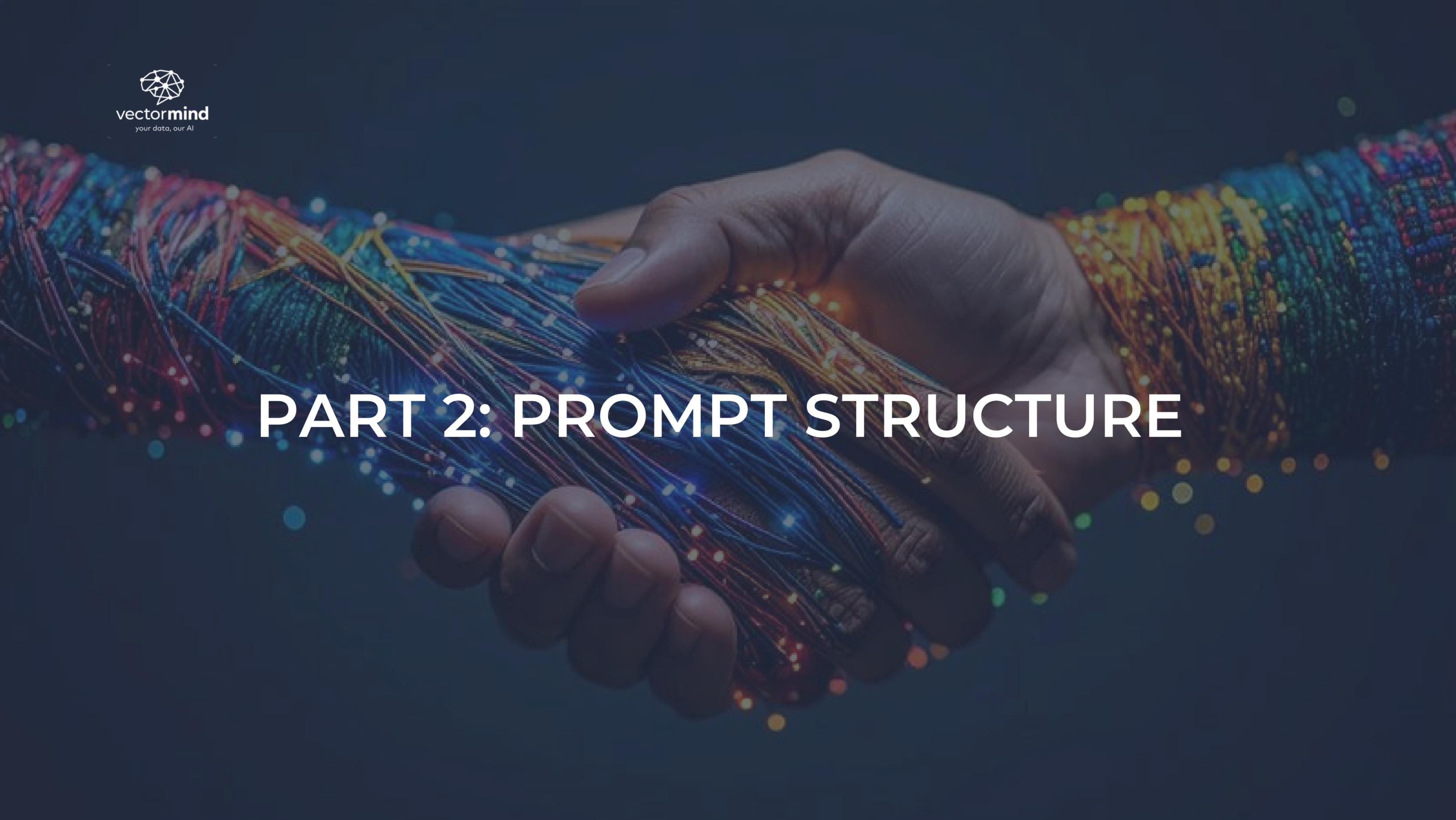
PART 2: PROMPT STRUCTURE

The RCTIF Framework

VectorMind recommends using the **RCTIF Framework** as your standard prompt architecture across all products:

```
1    R — Role
2    C — Context
3    T — Task
4    I — Input
5    F — Format
```

2.1 ROLE: Tell the AI Who It Should Be

The Role sets the AI's **persona, expertise level, and tone.**
Structure:

```
1    "You are a [role/persona] with expertise in [domain],
2    working for [company type/industry]."
```

PART 2: PROMPT STRUCTURE

Examples by VectorMind Product:

Product	Role Example
BusinessGPT	"You are a senior business analyst specialising in operational efficiency for South African enterprises."
Knowledge Nodes Domain Assistant	"You are an expert HR compliance advisor familiar with South African labour law."
Conversation IQ Call Analyzer	"You are a quality assurance specialist evaluating customer service interactions."
Iris Data Extraction	"You are a data analyst extracting structured information from unstructured business documents."
Agentic	"You are an autonomous project coordinator responsible for breaking down and executing multi-step business processes."

2.2 CONTEXT: Give the Right Background

Context is the **situation, background information, and constraints** the AI needs to produce a relevant response.
Structure:

```
1    "The context is: [background].
2    Our company [relevant details].
3    The audience for this output is [audience].
4    The current situation is [situation]."
```

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Context Checklist ✅

- Who is the audience?
- What is the business environment/industry?
- What constraints apply? (compliance, tone, confidentiality)
- What has already happened or been decided?
- What data or documents are you referencing?

Strong vs. Weak Context:

❌ WEAK:"We had a meeting about the project. Currently, the project is 3 weeks behind."

✅ STRONG:"We are a 200-person logistics company operating in Sub-Saharan Africa. We held a project steering committee meeting on 14 June 2025 to review our ERP migration. Key stakeholders included the CTO, CFO, and three department heads. The project is currently 3 weeks behind schedule due to data migration issues."

2.3 TASK: Be Explicit About What You Want Done

The Task is the **specific action or deliverable** you are requesting.
Structure:

```
1   "Your task is to [specific action verb] [specific deliverable]
2   that [purpose/goal]."
```

Power Action Verbs for Business Prompts:

Category	Verbs
Analysis	Analyse, Evaluate, Assess, Compare, Diagnose
Creation	Draft, Generate, Write, Create, Design
Summarisation	Summarise, Condense, Extract, Distil
Planning	Develop, Outline, Map, Sequence, Prioritise
Review	Review, Critique, Identify gaps, Flag risks
Transformation	Rewrite, Translate, Convert, Restructure

PART 2: PROMPT STRUCTURE

Task Examples:

✅ "Analyse the attached call transcript and identify the top 3 customer pain points and agent response quality."
✅ "Draft a professional follow-up email to a client who expressed dissatisfaction during a service call."
✅ "Generate a structured project status report based on the meeting notes provided."

2.4 INPUT: Provide the Raw Material

Input is the data, text, or information the AI should work with.

Types of Input:

Input Type	Example
Raw Text	Paste meeting notes, emails, reports directly
Data	Provide numbers, tables, or structured records
Documents	Reference uploaded files, links or Knowledge Nodes
Instructions	Additional rules or requirements
Examples	Show the AI a sample of what you want

PART 2: PROMPT STRUCTURE

Input Best Practices:

✅ Clearly label your input:
"Here is the call transcript: [TRANSCRIPT START] ... [TRANSCRIPT END]"

✅ Specify the source:
"Based on the Q2 financial report uploaded to this session..."

✅ Set boundaries:"Use only the information provided. Do not add external assumptions."

VectorMind Tip: In Knowledge Nodes, your uploaded documents become grounded context. Always reference the specific node or document to ensure the AI retrieves the most relevant information.

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2.5 FORMAT: What the Output Should Look Like

Format tells the AI how to structure and present its response.

Common Format Directives:

Format Type	Prompt Instruction
Bullet Points	*"Present your findings as concise bullet points."*
Numbered List	*"Provide a step-by-step numbered action plan."*
Table	*"Structure the output as a comparison table with columns for X, Y, Z."*
Report Format	*"Write in formal report format with: Executive Summary, Findings, Recommendations."*
Email Format	*"Format as a professional business email with Subject, Body, and Call to Action."*
JSON/Structured Data	*"Return the extracted data in JSON format."*
Executive Summary	*"Provide a 3-paragraph executive summary, maximum 150 words."*

Task Examples:

```
"Present your response in the following format:
## EXECUTIVE SUMMARY (2-3 sentences)
## KEY FINDINGS (bullet points, max 5)
## RISKS IDENTIFIED (numbered list)
## RECOMMENDED ACTIONS (table with columns: Action | Owner | Timeline)
## NEXT STEPS (bullet points)"
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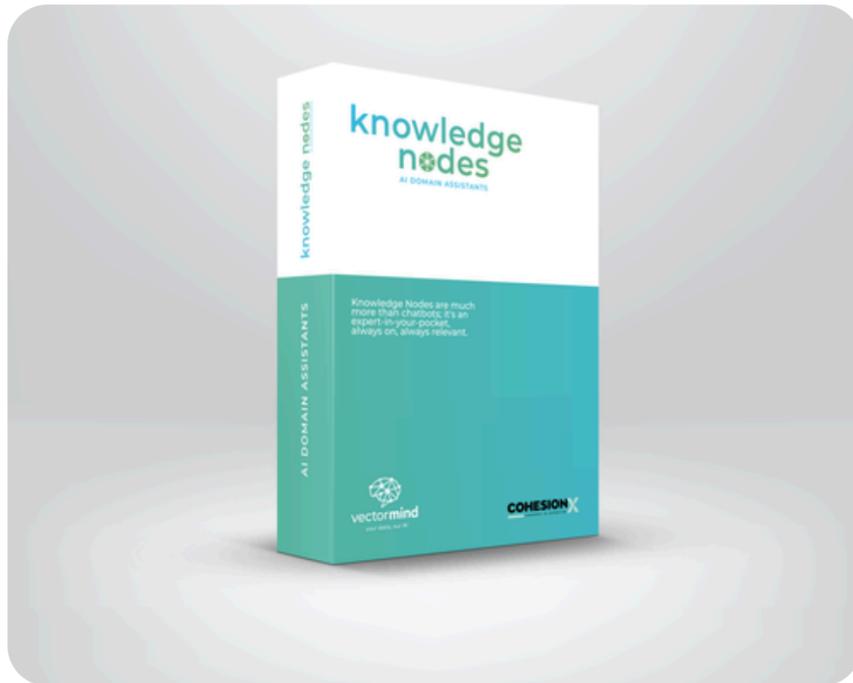
PART 3: BUSINESS USE CASES

3.1 Knowledge Nodes Domain Assistants

Specialised AI assistants trained or configured for specific business domains (HR, Legal, Finance, Operations, etc.), powered by VectorMind's Knowledge Node architecture.

Delivers expert-level responses grounded in your organisation's specific policies, documents, and domain knowledge.

Use Cases & Prompt Approaches:

HR Domain Assistant

```
ROLE: You are an HR policy advisor for our organisation.

CONTEXT: An employee has raised a query about parental leave entitlements under our company policy.
Our policy document is stored in the HR Knowledge Node.

TASK: Explain the parental leave policy clearly and list all qualifying conditions.

FORMAT: Use plain language, numbered steps, and include a note about who to contact for further
queries.
```

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Legal/Compliance Domain Assistant

> **ROLE:** You are a compliance officer specialising in South African POPIA regulations and corporate governance.
>
> **CONTEXT:** Our company is conducting an annual data privacy audit for our customer database operations.
>
> **TASK:** Generate a compliance checklist of the 10 most critical POPIA requirements we must verify during this audit.
>
> **FORMAT:** Numbered checklist with a Yes/No/Partial column and recommended action for each item. ain language, numbered steps, and include a note about who to contact for further queries.

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Finance Domain Assistant

```
ROLE: You are a financial analyst for a mid-size manufacturing company.

CONTEXT: Q3 results show a 12% decline in gross margin compared to Q2. Raw material costs increased
by 18%.

TASK: Analyse the margin pressure and propose 5 actionable cost-mitigation strategies appropriate for
a manufacturing environment.

FORMAT: Table format — Strategy | Expected Impact | Implementation Timeline | Risk Level
```

3.2 Neuroflow AI Workflows

VectorMind's Neuroflow Workflow engine allows organisations to automate multi-step AI-powered processes — chaining prompts, decisions, and actions together into repeatable business workflows.

Automates repetitive, multi-step knowledge work such as document processing, report generation, approvals, and notifications.

neuroflow

AI WORKFLOW

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Document Intake Workflow

ROLE: You are a document processing specialist.

CONTEXT: An incoming supplier invoice has been received and needs to be validated before being routed to accounts payable.

TASK:
Step 1 — Extract all key fields (supplier name, invoice number, date, line items, total, VAT, payment terms)
Step 2 — Validate that all required fields are present
Step 3 — Flag any discrepancies or missing information
Step 4 — Generate a processing status summary

INPUT: [Paste invoice text or reference uploaded document]FORMAT: Structured JSON for Step 1-3, plain text summary for Step 4

Use Cases & Prompt Approaches:

Escalation Workflow Prompt

```
ROLE: You are a customer service workflow orchestrator.

CONTEXT: A customer complaint has been flagged as high priority after failing first-contact
resolution twice.

TASK: Determine the appropriate escalation path, draft an acknowledgement to the customer, and
prepare a brief for the escalation manager.

FORMAT:
- Section 1: Escalation Recommendation (1 paragraph)
- Section 2: Customer Acknowledgement Email (professional tone)
- Section 3: Manager Brief (bullet points — issue, history, sentiment, suggested resolution)
```
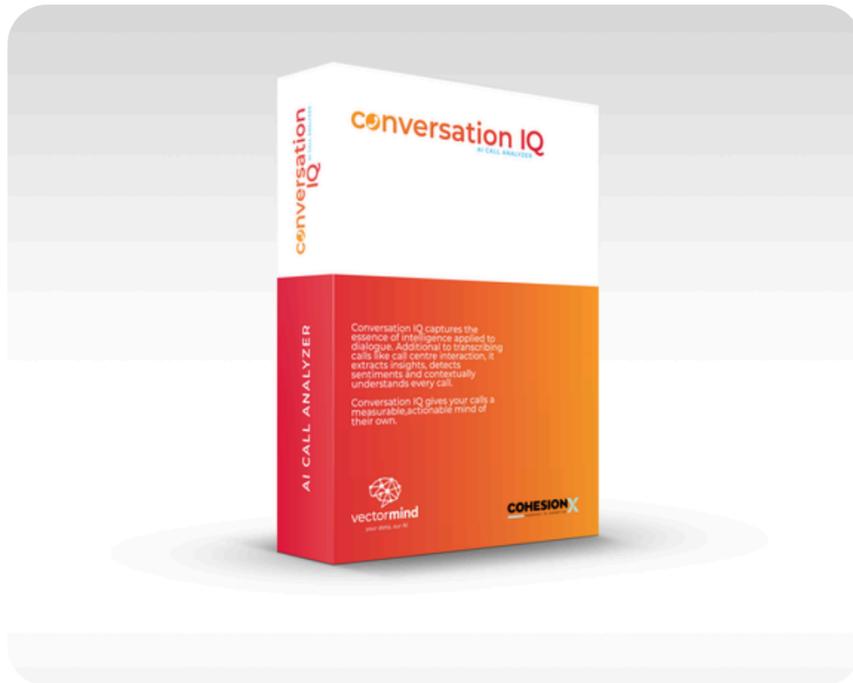
3.3 Conversation IQ Call Analyser

↗ VectorMind's Conversation IQ tool transcribes, analyses, and extracts intelligence from voice and text conversations — including call centre interactions, sales calls, and client meetings.

↗ Identifies sentiment, agent performance, compliance adherence, customer intent, and key topics from call data.

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AI CALL ANALYZER

Use Cases & Prompt Approaches:

Agent Quality Scoring

ROLE: You are a call centre quality assurance evaluator.

CONTEXT: The following is a transcript of a customer service call from our telecommunications support centre. Our quality standards require: greeting within 5 seconds, empathy statements, first-call resolution attempt, correct product information, and proper close.

TASK: Score the agent's performance out of 10 across each quality dimension. Identify strengths and specific improvement areas.

INPUT: [TRANSCRIPT] ... [/TRANSCRIPT]

FORMAT:
Scoring Table: Dimension | Score /10 | Evidence from Call
Summary: 3 Strengths, 3 Development Areas
Overall Score: X/50
Coaching Recommendation: 2-3 sentences

PART 3: BUSINESS USE CASES

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AI CALL ANALYZER

Use Cases & Prompt Approaches:

Sentiment & Churn Risk Analysis

```
ROLE: You are a customer experience analyst.

CONTEXT: Analyse the following customer call to assess satisfaction level and churn risk for our CRM
team.

TASK: 1. Identify the customer's primary sentiment (Positive/Neutral/Negative/Mixed)2. Detect any
churn risk signals or dissatisfaction triggers3. Extract the key issue(s) raised4. Recommend a
follow-up action

INPUT: [TRANSCRIPT] ... [/TRANSCRIPT]

FORMAT: Structured report with sections for each task above. Flag HIGH/MEDIUM/LOW churn risk clearly
at the top.
```

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Sales Call Intelligence

```
ROLE: You are a sales performance coach.

CONTEXT: The following transcript is from a B2B sales discovery call for our enterprise software
product.

TASK: Identify the prospect's key pain points, buying signals, objections raised, and recommended
next steps for the sales rep.

INPUT: [TRANSCRIPT] ... [/TRANSCRIPT]

FORMAT:
- Pain Points: Bullet list
- Buying Signals: Bullet list
- Objections: Table — Objection | How Handled | Suggested Better Response
- Deal Stage Assessment: Early/Mid/Late
- Recommended Next Steps: Numbered action list
```

3.4 Iris
Data Extraction

VectorMind's Iris AI Powered Data Extraction capability uses AI to identify, extract, and structure information from unstructured documents, such as PDFs, contracts, invoices, forms, and reports.

Converts unstructured text into structured, actionable data ready for downstream systems or analysis.

iris
AI POWERED DATA EXTRACTION

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Contract Data Extraction

ROLE: You are a contract data extraction specialist.

CONTEXT: The following is a supplier service agreement. We need to extract key commercial and legal terms for our contract management system.

TASK: Extract all specified data fields accurately. If a field is not found, mark as "NOT SPECIFIED".

INPUT: [CONTRACT TEXT] ... [/CONTRACT TEXT]

FORMAT: Return as a structured table with these fields:| Field | Extracted Value |
- Parties (full legal names)
- Contract Date- Effective Date
- Expiry Date
- Auto-renewal clause (Y/N + terms)- Payment terms
- Notice period
- Penalty clauses- Governing law
- Key deliverables (list)
- SLA commitments

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Invoice Batch Processing

```
ROLE: You are an accounts payable data extraction bot.
CONTEXT: Process the following invoice for data entry into our ERP system. Validate against our
standard required fields list.
TASK: Extract all invoice data, validate completeness, and flag any exceptions.
INPUT: [INVOICE DATA] ... [/INVOICE DATA]
FORMAT: JSON structure:
{
"supplier_name": "",
"invoice_number": "",
"invoice_date": "",
"due_date": "",
"line_items": [],
"subtotal": "",
"vat": "",
"total": "",
"exceptions": []
}
```

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Policy Document Extraction

ROLE: You are a knowledge management specialist.
CONTEXT: We are migrating our HR policy library into VectorMind Knowledge Nodes and need each policy
indexed with key metadata.
TASK: Extract the key metadata and summary from the following policy document.
INPUT: [POLICY DOCUMENT] ... [/POLICY DOCUMENT]
FORMAT:
- Policy Title:
- Policy Number:
- Effective Date:
- Review Date:
- Applicable To (employee categories):
- Key Rules (bullet points, max 5):
- Consequences of Non-compliance:
- Policy Owner:
- 50-word Plain Language Summary:

3.5 Synaptic Search
Flat Query Assistant Control

Synaptic Query Assistant Control provides a structured, controlled interface for querying business data, databases, or document repositories using natural language — without needing SQL or technical expertise.

Democratises data access, allowing non-technical users to query structured and unstructured data sources through natural language prompts.

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Sales Data Query

```
ROLE: You are a business intelligence assistant.

CONTEXT: I am querying our sales database for the period January to June 2025. Currency is ZAR.
Region codes: JHB, CPT, DBN, PE.

TASK: Retrieve and summarise sales performance by region, identify the top 5 sales representatives by
revenue, and flag any regions below target.

FORMAT:
- Regional Performance Table: Region | Revenue | Target | Variance | Status
- Top 5 Reps: Name | Region | Revenue | % of Target
- Below -Target Alert: List with gap amount
```

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Inventory Query

ROLE: You are an inventory management assistant.

CONTEXT: Query the product inventory database. Reorder threshold is 50 units. Lead time for all suppliers is 14 days.

TASK: Identify all products currently below reorder threshold, calculate days of stock remaining (based on average daily sales), and generate a prioritised reorder list.

FORMAT: Table — Product | SKU | Current Stock | Reorder Point | Days Remaining | Priority (High/Med/Low) | Suggested Order Qty

Use Cases & Prompt Approaches:

HR Headcount Query

```
ROLE: You are an HR analytics assistant.

CONTEXT: I need a headcount analysis from our HR system for the current financial year. Organisation
has 5 divisions.

TASK: Provide headcount by division, identify departments with more than 10% vacancy rate, and
summarise total permanent vs. contract staff ratio.

FORMAT:
- Headcount Table: Division | Headcount | Vacancies | Vacancy Rate %
- Alert: Divisions exceeding 10% vacancy threshold
- Staff Type Summary: Permanent | Contract | Ratio
```

3.6 Business GPT

↗ Business GPT is VectorMind's enterprise AI assistant: a business-focused, secure conversational AI designed to handle a wide range of business tasks, including strategy, communication, research, content creation, and decision support.

↗ A versatile, context-aware AI assistant that understands business language, processes, and objectives. Built for professional environments.

business GPT

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business GPT

Use Cases & Prompt Approaches:

Strategic Planning

```
ROLE: You are a strategic business advisor with 20 years of experience in African markets.

CONTEXT: We are a South African fintech startup with 50 employees, R15M in annual revenue, currently
serving SMEs with payment processing solutions. We are planning 3-year expansion into East African
markets.

TASK: Develop a high-level market entry framework for Kenya and Tanzania, including key success
factors, regulatory considerations, and competitive landscape overview.

FORMAT:## Market Entry Framework
- Market Opportunity Assessment
- Key Success Factors (bullet list per country)
- Regulatory Considerations (table per country)
- Top 3 Risks and Mitigation Strategies
- Recommended Entry Approach (90-day action plan)
```

PART 3: BUSINESS USE CASES

business GPT

Use Cases & Prompt Approaches:

Executive Communication

ROLE: You are a senior executive communications specialist.

CONTEXT: Our company is announcing a organisational restructuring that will affect 15% of our workforce. The message needs to convey empathy, transparency, and confidence in the future direction.

TASK: Draft an all-staff communication from the CEO that addresses the restructuring, acknowledges the impact, explains the strategic rationale, and outlines support available.

TONE: Empathetic, direct, professional, forward-looking.

FORMAT: Email format — Subject line, Opening, Body (3 paragraphs), Closing, Clear next steps for affected employees.

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business GPT

Use Cases & Prompt Approaches:

Competitive Intelligence Summary

```
ROLE: You are a market research analyst.

CONTEXT: We are preparing a competitive briefing for our executive team prior to a product strategy
session. Our industry is B2B SaaS HR technology in South Africa.

TASK: Summarise the competitive landscape, identify the top 5 competitors, and analyse key
differentiators, pricing models, and market positioning.

FORMAT:
- Market Overview (1 paragraph)
- Competitor Table: Company | Key Products | Pricing Model | Target Market | Strengths | Weaknesses
- Strategic Gaps/Opportunities (bullet points)
- Recommended Positioning Statement for our product
```

3.7 Agentic AI

↗ VectorMind's Agentic AI capability is an AI that can autonomously plan, reason, and execute multi-step tasks with minimal human intervention, integrating across systems and data sources.

↗ Agentic AI goes beyond answering questions. It acts, breaking down complex goals into sequential tasks, making decisions, and completing end-to-end business processes autonomously.

Understanding Agentic Prompting

Agentic prompts differ from standard prompts — they define **goals**, not just tasks, and give the AI permission to **plan and execute** autonomously.

```
Standard Prompt: "Summarise this report."

Agentic Prompt: "Review all overdue client accounts,
identify those at risk of escalation,
draft personalised outreach emails for each,
and prepare a summary report for the
collections manager — then flag for approval."
```

PART 3: BUSINESS USE CASES

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Use Cases & Prompt Approaches:

Agentic Research & Report Generation

```
GOAL: Produce a comprehensive competitive analysis report for our Q3 board presentation.

AGENT INSTRUCTIONS:
1. Review all competitor documents in the Market Intelligence  Knowledge Node
2. Identify pricing, product, and positioning changes  in the last 6 months
3. Cross-reference with our internal sales win/loss data
4. Generate a structured competitive analysis report
5. Highlight top 3 strategic recommendations
6. Format as a board-ready presentation outline

CONSTRAINTS:
- Use only information from approved Knowledge Nodes
- Flag any areas where data is insufficient
- Present findings suitable for C-suite audience

OUTPUT: Full report + executive summary (max 300 words)
```

PART 3: BUSINESS USE CASES

Use Cases & Prompt Approaches:

Agentic Customer Onboarding

```
GOAL: Automate the new enterprise customer onboarding knowledge pack creation process.

AGENT INSTRUCTIONS:
1. Retrieve customer profile from [Customer Name] intake form
2. Pull relevant product documentation from the  Product Knowledge Node matching their purchased modules
3. Customise the welcome documentation with customer-specific details
4. Generate a personalised onboarding checklist
5. Draft welcome email from the Account Manager
6. Create a 30-day success milestone plan
7. Compile all into a structured onboarding document

CONSTRAINTS:
- All communications must use approved brand voice
- Include compliance disclosures where applicable
- Flag any missing customer information for human review

OUTPUT: Complete onboarding pack ready for Account Manager approval
```

## Use Cases & Prompt Approaches:

Agentic Process Monitoring

```
GOAL: Monitor weekly KPI performance and proactively identify issues requiring management attention.

AGENT INSTRUCTIONS:
1. Pull this week's KPI data from the Performance Dashboard node
2. Compare against targets and prior week performance
3. Identify any KPIs more than 10% below target
4. For each underperforming
KPI:  a. Identify likely root cause from operational data
b. Suggest corrective action
5. Generate a management exception report
6. Prioritise issues by impact (High/Medium/Low)

OUTPUT:
- Exception Report (table format)
- Management Alert email (for KPIs flagged HIGH)
- Trend commentary (2 sentences per flagged KPI)
```
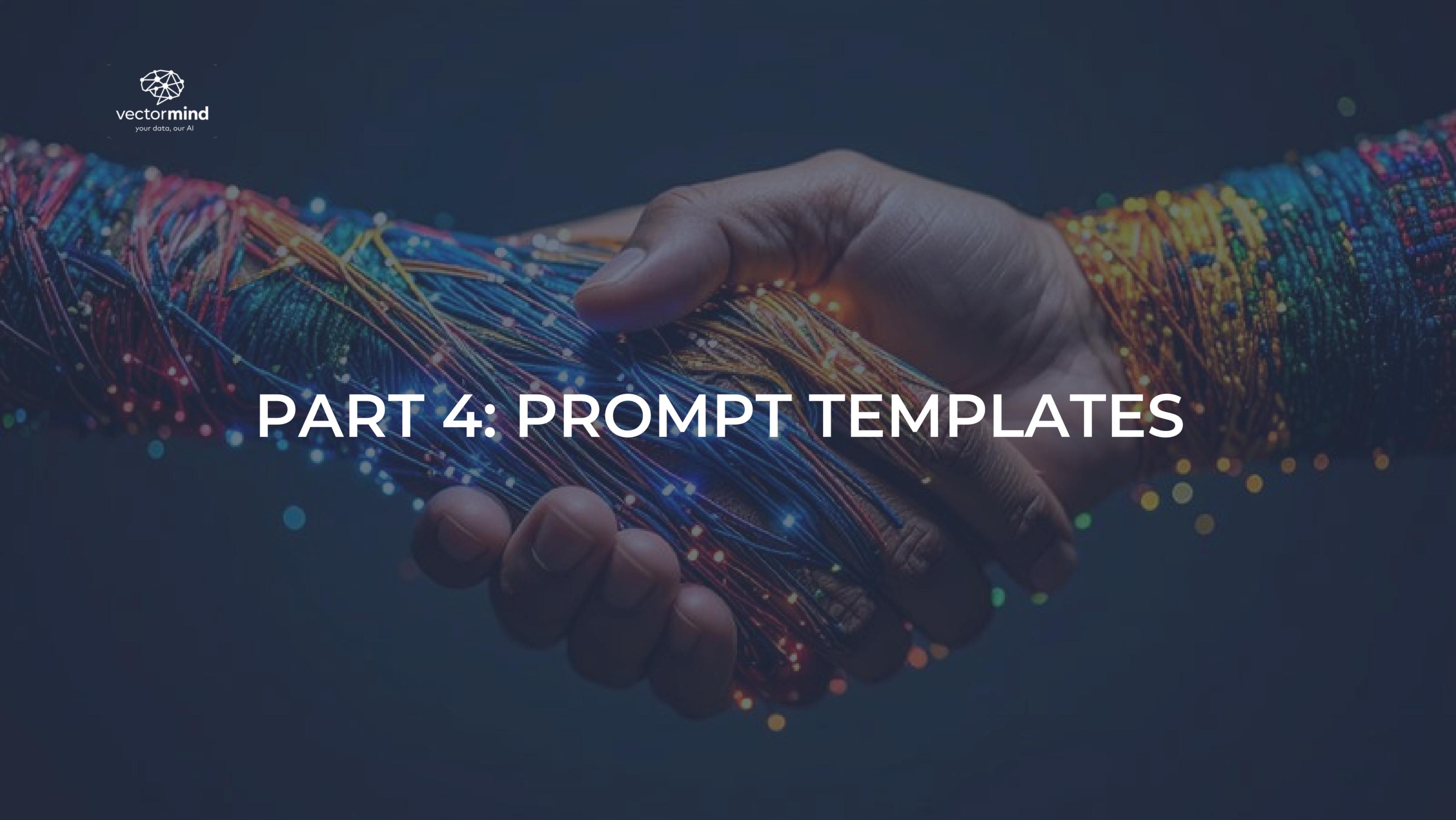
PART 4: PROMPT TEMPLATES

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Template Structure:

```
ROLE: You are a professional business communication specialist.
CONTEXT:
- Sender: [Your Name/Role]
- Company: [Company Name]
- Recipient: [Recipient Name/Role/Company]
- Relationship: [New contact / Existing client / Internal colleague]
- Background: [Brief context of the situation]
TASK: Draft a professional [email type] email that achieves the following objective: [specific goal]
KEY POINTS TO INCLUDE:
- [Point 1]
- [Point 2]
- [Point 3]
TONE: [Formal / Semi-formal / Warm / Urgent / Empathetic]
FORMAT:
Subject: [Generate a compelling subject line]
Greeting: [Appropriate salutation]
Body: [3-4 focused paragraphs]
Call to Action: [Clear, specific next step]
Sign-off: [Professional close]
CONSTRAINTS:
- Maximum 300 words
- Avoid jargon
- Do not make promises about [specific constraints]
```

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Ready-to-Use Email Templates:

Follow-Up Email After Meeting

```
ROLE: Professional business communicator.

CONTEXT:
I am [Your Name], [Your Role] at [Company].
I met with [Client Name] from [Client Company] on [Date] to discuss [topic/product].
The meeting went [well/mixed - specify].
Key discussion points were: [list them].

TASK: Write a follow-up email that recaps the meeting, confirms next steps, and maintains positive
momentum.

TONE: Professional and warm.

FORMAT: Subject line + email body, max 250 words.
Include: Meeting recap (2 sentences), agreed next steps (numbered), and a clear CTA with proposed
date.
```

Ready-to-Use Email Templates:

Complaint Response Email

ROLE: Senior customer relations professional.

CONTEXT: Customer [Name] has complained about [specific issue] via [channel] on [date].
The complaint is [valid/partially valid].
Our resolution is: [resolution details].
Company policy on this matter states: [policy].

TASK: Draft an empathetic, solution-focused response that acknowledges the issue, explains our position, offers resolution, and works to retain the customer relationship.

TONE: Empathetic, professional, solution-oriented.

FORMAT: Subject | Greeting | Acknowledgement paragraph | Resolution paragraph | Next steps | Closing.

PART 4: PROMPT TEMPLATES

Ready-to-Use Email Templates:

Internal Announcement Email

ROLE: Internal communications specialist.

CONTEXT: Company [Company Name] is announcing [announcement topic] effective [date].
Key stakeholders affected: [list]. Reason for announcement: [rationale].
Anticipated questions/concerns: [list].

TASK: Draft a clear, transparent all-staff announcement email.

TONE: Clear, positive, reassuring.

FORMAT: Subject line | Opening (context/why) | What is changing | What stays the same | What employees should do | Who to contact | Sign-offWord limit: 350 words maximum.

---

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Template Structure:

```
ROLE: You are an executive assistant and meeting documentation specialist.

CONTEXT:
- Meeting Type: [Board / Team / Client / Project / One-on-one]
- Date: [Date]- Attendees: [List with roles]- Duration: [Duration]
- Purpose: [Meeting objective]

TASK: Analyse the following meeting notes/transcript and produce a professional meeting summary.

INPUT: [MEETING NOTES/TRANSCRIPT START]... paste content here ...[MEETING NOTES/TRANSCRIPT END]

FORMAT:##
MEETING SUMMARY**Date:** | **Duration:** | **Facilitator:**
**ATTENDEES:**[List]
**MEETING OBJECTIVE:**[1 sentence]
**KEY DISCUSSION POINTS:**[Bullet points — topic + outcome for each]
**DECISIONS MADE:**[Numbered list of confirmed decisions]
**ACTION ITEMS:**| Action | Owner | Due Date | Priority |
**OPEN ISSUES / PARKING LOT:**[Items deferred or unresolved]
**NEXT MEETING:**[Date/agenda if discussed]
**SUMMARY PARAGRAPH:**[3-4 sentence overview for those who didn't attend]
```

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Quick Meeting Summary (Short Version):

```
Summarise the following meeting notes into:
1. A 3-sentence overview
2. All decisions made (numbered list)
3. All action items (table: Action | Owner | Deadline)
4. Any unresolved issues
Keep the entire summary under 300 words.[PASTE NOTES HERE]
```

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Template Structure:

ROLE: You are a professional business report writer with expertise in [industry/domain].
CONTEXT:
- Report Title: [Title]
- Report Purpose: [Why this report is being produced]
- Audience: [Who will read this — e.g., Executive Committee, Board, Operational Team, Client]
- Period Covered: [Time period]
- Data Source: [Where the underlying data comes from]
TASK: Generate a comprehensive [report type] report based on the following data/information.
INPUT:[PASTE DATA, NOTES, OR REFERENCE KNOWLEDGE NODE HERE]
FORMAT — Use the following report structure:# [REPORT TITLE]**Prepared by:** | **Date:** | **Classification:**##
1. EXECUTIVE SUMMARY[3-5 sentences — headline findings and key recommendation]##
2. BACKGROUND & OBJECTIVES[Context and purpose of the report]##
3. METHODOLOGY[How data was gathered and analysed]##
4. KEY FINDINGS[Numbered findings with supporting data]##
5. ANALYSIS[Interpretation of findings — what they mean]##
6. RISKS & CONSIDERATIONS[Table: Risk | Likelihood | Impact | Mitigation]##
7. RECOMMENDATIONS[Numbered, actionable recommendations in priority order]##
8. CONCLUSION[Closing paragraph — overall position and call to action]##
9. APPENDICES[Reference any supporting documents]
STYLE:
- Formal, objective, evidence-based
- No filler language- Use data to support every claim
- Maximum [X] pages / [X] words

Specialised Report Templates:

Sales Performance Report

```
ROLE: Business performance analyst.

CONTEXT: Monthly sales performance report for [month/year], presenting to the commercial leadership
team.

TASK: Generate a sales performance report from the data below.

INPUT: [SALES DATA]

INCLUDE: Revenue vs. target | Pipeline health | Top performers | Underperformers | Customer
acquisition vs. retention split | Key wins | Lost deals analysis | 3 strategic recommendations for
next month.

FORMAT: Executive report with tables and bullet points. Max 500 words + data tables.
```

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Specialised Report Templates:

Project Status Report

```
ROLE: Project management office analyst.

CONTEXT: Weekly project status update for [Project Name], for the project steering committee.

TASK: Convert the following project notes into a formal status report.

INPUT: [PROJECT NOTES]

FORMAT:
- Status (RAG rating: Red/Amber/Green)
- % Complete
- Milestone Summary Table
- Issues & Risks Log
- Key Achievements This Period
- Planned Activities Next Period
- Budget Status
- Decisions Required from Steering Committee
```

PART 5: BEST PRACTICES

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5.1 Be Specific

The Specificity Ladder:

```
LEVEL 1 (Vague):
"Write something about customer service."

LEVEL 2 (Better):
"Write about improving customer service."

LEVEL 3 (Good):
"Write tips for improving call centre customer service response times."

LEVEL 4 (Excellent):
"Write 5 actionable tips for reducing average handling time in a B2B insurance
call centre, targeting frontline agents,focused on process efficiency rather than
script changes. Include measurable outcomes for each tip."
```

PART 5: BEST PRACTICES

5.1 Be Specific

Specificity Checklist ✅
- Who — specify the role/persona and audience
- What — define the exact deliverable
- Why — provide purpose/intent
- When — time period, urgency, deadlines
- Where — department, region, system, platform
- How much — word count, number of items, depth of detail
- For whom — audience level (executive / technical / customer)

5.2 Provide Context

The Context Hierarchy:

```
LAYER 1 — ORGANISATIONAL CONTEXT"We are a [size] company in [industry], operating in
[region/market]."
LAYER 2 — SITUATIONAL CONTEXT"Currently we are facing [situation/challenge]."
LAYER 3 — AUDIENCE CONTEXT"This output is intended for [specific audience] who [know/don't know X]."
LAYER 4 — CONSTRAINT CONTEXT"We must adhere to [regulations/policies/brand guidelines]."
LAYER 5 — DATA CONTEXT"The relevant information is: [paste data or reference Knowledge Node]."
```

PART 5: BEST PRACTICES

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Context Do's and Don'ts:

✅ DO	❌ DON'T
Provide industry-specific terminology	Use ambiguous language
State your audience explicitly	Assume the AI knows your company
Reference specific documents/nodes	Leave data sources vague
Explain constraints and boundaries	Omit compliance requirements
Give relevant background	Over-explain irrelevant history

5.3 Define Output Structure

Without a defined structure, the AI will make its own formatting choices, which may not match your workflow, system, or audience.

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The Output Structure Toolkit:

1. Specify the Format Type

> "Return your response as a [table / bulleted list / numbered list / paragraph / JSON / markdown / plain text]"

2. Define the Sections

> "Structure your response with these exact sections:##
> Section 1: [Name]##
> Section 2: [Name]##
> Section 3: [Name]"

3. Set Length Constraints

> "Limit your response to:- Maximum 500 words total- No more than 3 bullet points per section- Executive summary: 2 sentences only"

The Output Structure Toolkit:

4. Specify the Audience Reading Level

> "Write for a non-technical executive audience — avoid jargon, explain acronyms, focus on business impact rather than technical detail."

5. Use Labelling for Extracted Content

> "Label each extracted field clearly as:[FIELD NAME]: [Extracted Value]"

Output Structure Examples:

> ✅ STRUCTURED PROMPT ENDING:
> "Present your full response in the following structure only:
> 1. Summary (max 3 sentences)
> 2. Key Points (5 bullets maximum)
> 3. Risks (table: Risk | Impact | Mitigation)
> 4. Recommendation (1 paragraph)
> Do not include any preamble or closing remarks."

5.4 Additional Best Practices

Iterate and Refine

```
First pass: Get the structure right
Second pass: "Now add more detail to section 3 only."
Third pass: "Rewrite the executive summary to be more assertive."
```

Use Anchors and Examples

```
"Write in the style of the following example:[EXAMPLE START]... paste example ...[EXAMPLE END]Now
apply this style to: [your actual content]"
```

Test Before You Deploy (for Workflows & Agents)

```
"Before providing the final output, first show me your interpretation of what I'm asking, then
proceed only if your interpretation is correct."
```

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5.4 Additional Best Practices

Chain Your Prompts

```
Prompt 1: Extract the data
Prompt 2: Analyse the extracted data
Prompt 3: Generate recommendations from the analysis
Prompt 4: Format the recommendations as a report
```

The Clarification Request

```
"If you need any clarification to complete this task accurately, ask me before proceeding."
```

Classification	Definition	Prompting Guidance
🟢 Public	Information already publicly available	Safe to include in any prompt
🟡 Internal	General business information	Use within approved VectorMind environment only
🟠 Confidential	Sensitive business data, client info, financial details	Only in secure, approved AI environments — anonymise where possible
🔴 Restricted	Personal data, legal matters, board-level strategy, PII	Requires explicit authorisation — anonymise or reference only

QUICK REFERENCE CARD

Print or pin this reference card for convenient daily use

```
VECTORMIND PROMPT QUICK REFERENCE

THE RCTIF FRAMEWORK
R — Role: What role is assigned to the AI?
C — Context: What's the situation?
T — Task: What must be done?
I — Input: What data to use?
F — Format: How should it look?


SPECIFICITY CHECKLIST ☐ Who ☐ What ☐ Why ☐ When ☐ Where ☐ How much


PRODUCT PROMPT FOCUS
```

Knowledge Nodes Domain Assistant → Knowledge + Expertise
Neuroflow AI Workflows → Step-by-step automation
Conversation IQ Call Analyzer → Transcript + Quality + Sentiment
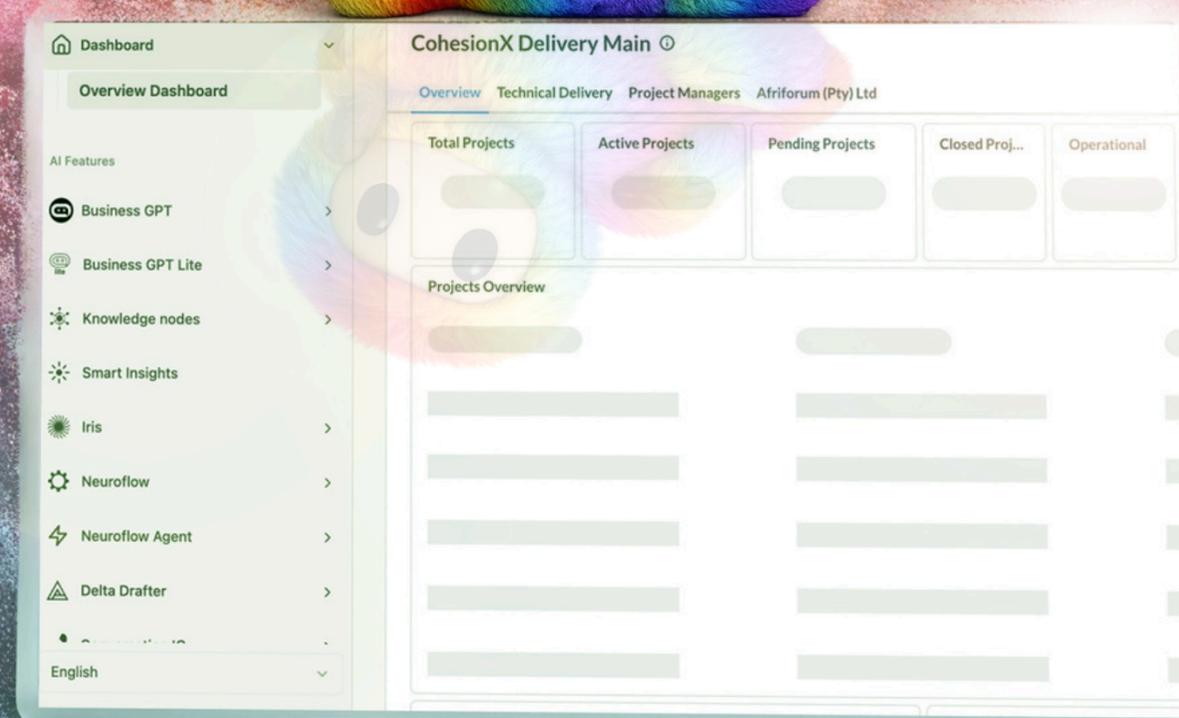**Iris Data Extraction** → Fields + Validation + Structure
BusinessGPT → Strategy + Communication + Research
Agentic → Goals + Autonomy + Multi-step execution

www.cohesionx.co.za

www.vectormind.online

For VectorMind platform support, log a ticket:

https://cohesionx.co.za/cohesionx-support-form/

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