

# THE SME GUIDE TO BUILDING CUSTOM GPTs.

No code, no fuss and no tech-expertise needed. Step-by-step instructions for busy business owners.

A practical guide to creating custom AI tools that boost productivity and generate new income.



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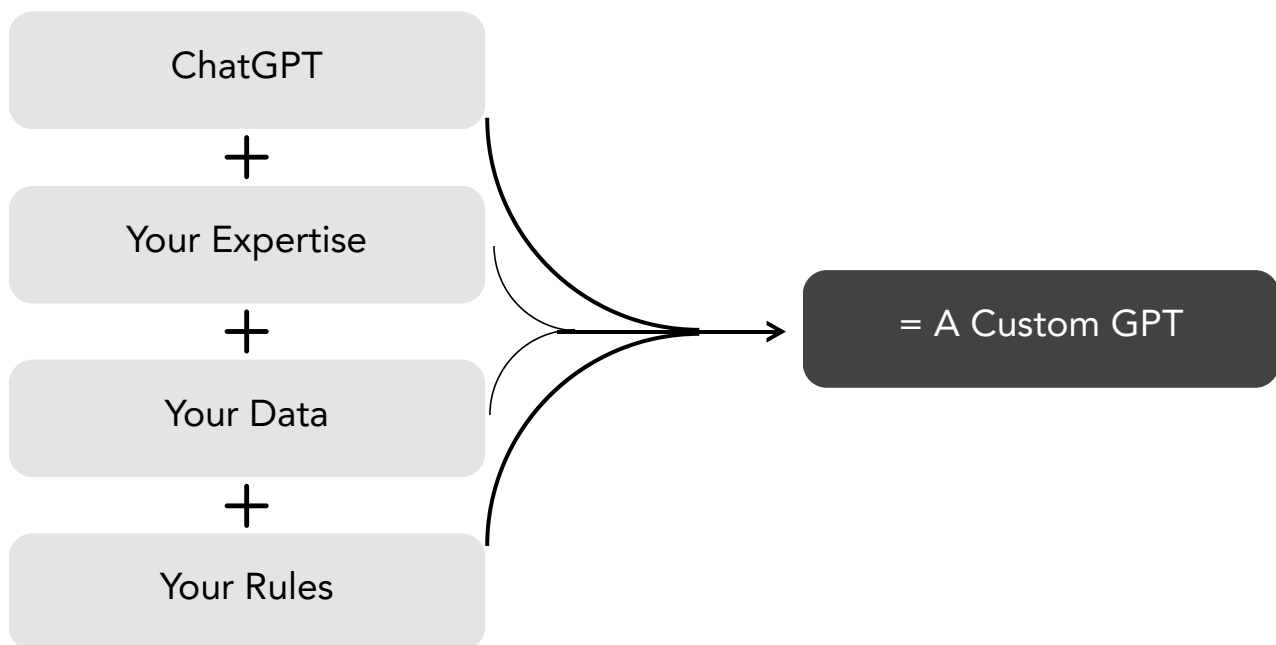
# 1. Introduction

You no longer need to understand coding to leverage efficiency in your business. When OpenAI released ChatGPT, a generative artificial intelligence chatbot in 2022, a new tech era was born, and forward-thinking business owners are already on the journey.

## What Is a Custom GPT?

A Custom GPT is a personalised version of ChatGPT that you design and train to perform specific tasks, using your own instructions, data, and style.

Think of it as building your own AI assistant; one that understands your business, processes, tone, and goals, without needing to code.



### This guide will:

- Teach you the benefits of building custom GPTs, and examples of uses.
- Give you a step-by-step guide to building your first custom GPT.
- Give examples of how businesses are already leveraging custom GPTs to increase efficiency for day-to-day tasks.



## 2. How it Works and Examples of Use

Over recent years, AI has come under fire for moral and ethical reasons. Studies have been carried out to address some of the perceived issues with AI, and ensure that it is fair and transparent.

### How it works...

- ➔ Custom GPTs are built inside ChatGPT (via “Explore GPTs → Create”). You need a paid subscription to build a GPT.
- ➔ You define:
  - Role/persona: e.g. “Expert HR policy advisor for UK SMEs.”
  - Instructions: how it should think and respond (tone, method, limits).
  - Knowledge base: upload your documents (PDFs, policies, reports).
  - Capabilities: e.g. web search, data analysis, code execution.
- ➔ The GPT then uses this setup automatically for every query.

### Typical uses in SME businesses...

Use	Example of Action
<b>Customer Service</b>	Automated FAQ assistant trained on your company’s support documents.
<b>Internal Knowledge Base</b>	GPT that answers staff questions using company policies and handbooks.
<b>Marketing Support</b>	Brand voice copywriter that follows your tone and messaging guides.
<b>Training &amp; Onboarding</b>	HR GPT that walks new hires through company values, compliance, and benefits.
<b>Project Management</b>	GPT that summarises meeting notes, tracks actions, and drafts reports.

### 3. Why SMEs Need Custom GPTs



#### OPERATIONAL EFFICIENCY:

Automating repetitive tasks (email drafting, document generation, proposal writing) reduces time spent and errors.



#### CONSISTENCY & QUALITY:

Style, brand voice, answers aligning with policy; a custom GPT can reduce variations.



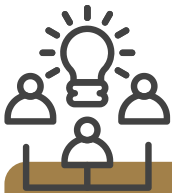
#### BETTER DECISION MAKING:

By surfacing data insights, quickly summarising reports, highlighting anomalies etc.



#### COST SAVINGS:

Reducing cost of manual labour, reducing reliance on external agencies or outsourcing for content or support.

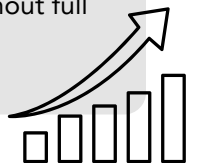


#### FASTER ONBOARDING & TRAINING:

Internal knowledge stored in the GPT means new staff can self-serve.

#### SCALABILITY & FLEXIBILITY:

As business scales, GPTs can be updated, changed, or expanded without full retraining.



*"SME business owners work notoriously hard, and anything they can do to claw back some time is always high on the priority list - yet there is some reluctance to engage in AI due to a fear that they 'don't yet know enough'. This guide makes it simple, in just 8 steps you can build a custom GTP that will transform part of your business operations.*

*I've seen it in my own work, I've **increased efficiency by as much as 83%** by building a GPT for specific tasks!"*

Chris Gault, Client Services Director and Lead Business Coach, CH4B.



# 4. Step-by-Step Guide to Building a Custom GPT.

## Before you start...

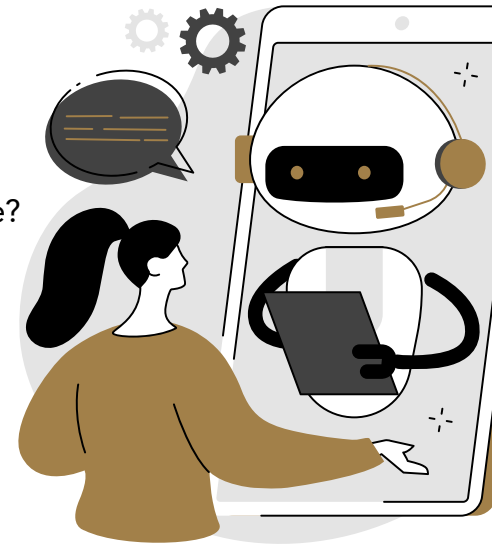
Sign up to a paid subscription for ChatGPT. This ensures your GPT can have memory, file uploads, and controlled data access.

## Step 1 - Define Purpose & Outcome

**ACTION:** Identify your specific business outcome. For example, do you want to save time, increase accuracy, or generate revenue?

Decide who (or which business function) the GPT will serve and what it should do. Is it for customer support, internal knowledge base, content marketing, etc.? Be specific.

*Tip: Narrow scopes lead to higher quality.*



## Step 2 - Adopt the RITOC Prompt Framework

**ACTION:** Define your RITOC framework. This is the anatomy of a ChatGPT prompt, and sets the boundaries for tasks. Think about what you are trying to achieve, and the output format you would like.

Below uses the example of a renewable energy firm that wants the GPT to provide content for social media posts.

Role: Expert brand strategist

Task: Write social media content

Context: For a renewable energy company in Sussex

Reasoning: Targetting home-owners in Sussex

Output: Social media captions for FaceBook and Instagram and suggestions for visuals in a downloadable text file.

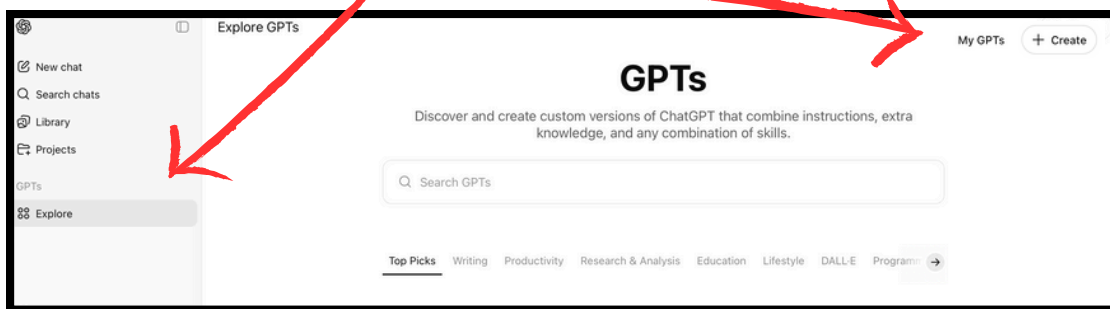
Ready to see what AI could do for your business?

[Book a free Strategy Call with CH4B](#) and we'll help you identify areas you can automate or optimise using AI.

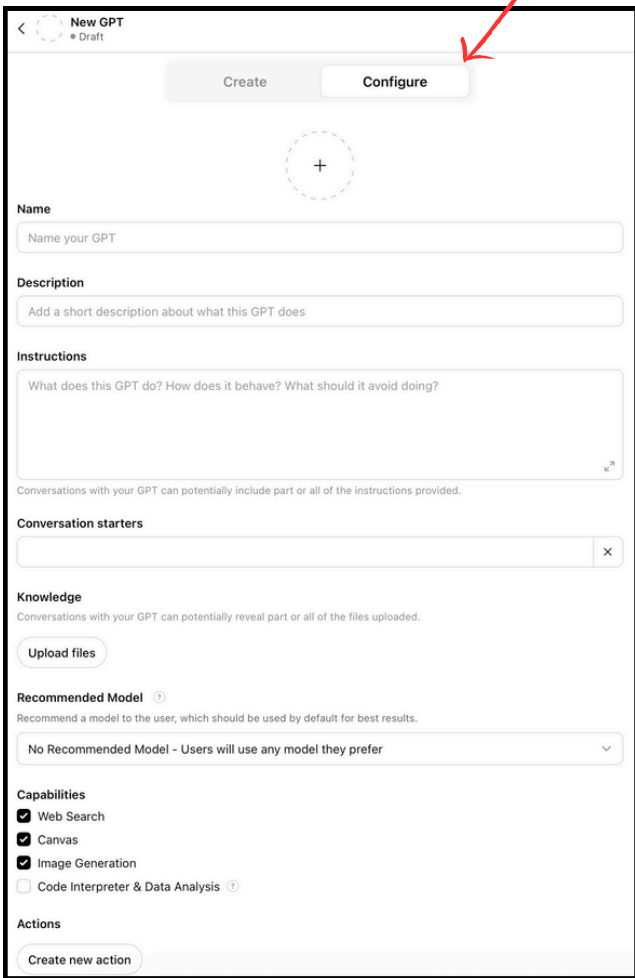
# 4. Step-by-Step Guide to Building a Custom GPT continued.

## Step 3 - Log in to ChatGPT and create your GPT...

ACTION: Navigate to Explore GPTs → Create,



ACTION: Once you have clicked create, you can start to populate the details. Toggle to the 'Configure' Screen.



- ← Name your GPT so you can easily locate it.
- ← Add what the GPT does, for example is it a writer or a project manager, or a researcher?
- ← Add the RITOC instructions from stage 2 here.
- ← Add 'Conversation Starters' that will appear as 'buttons' when you open the GPT - [more on this on p9.](#)
- ← Add up to 20 files here (ideally TXT format), for example, company background, brand guidelines, data, research, stock inventories or shift planners. You can then refer to these in instructions.
- ← Select the model of ChatGPT that you'd like to use, or leave blank.
- ← Choose the capabilities you'd like the GPT to have.
- ← 'Actions' let your Custom GPT connect to external tools, apps, or data sources - [more on this on p10.](#)



## 4. Step-by-Step Guide to Building a Custom GPT continued.

### Step 3 continued...

**ACTION:** Add 'Conversation starters' to your GPT so that you can access quick prompts in future. These conversation starters will display as buttons when you open your GPT so that you can quickly access regular tasks. Be short, clear, and action-focused and use natural language; think about what you would ask the GPT to do.

Here are some examples of conversation starters for different types of GPT functions...

GPT Type	Conversation Starters Examples
<b>Marketing GPT</b>	"Create a week of LinkedIn posts about employee wellbeing." or "Draft a short email campaign for our new service."
<b>HR/Onboarding GPT</b>	"Explain our annual leave policy in simple terms." or "Guide a new starter through our company values."
<b>Sales Assistant GPT</b>	"Summarise the benefits of our software for SMEs." or "Draft a follow-up email for a warm lead."
<b>Operations/Project GPT</b>	"Turn these meeting notes into an action list." or "Generate a weekly report summary for management."
<b>Consulting/Coaching GPT</b>	"Help me design a business strategy session." or "List key AI tools a startup should use."

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## 4. Step-by-Step Guide to Building a Custom GPT continued.

### Step 3 continued...

**ACTION:** Add 'Actions' to connect your GPT to external tools, apps, or data sources. It teaches your GPT to perform tasks in the real world, using APIs or web services.

Examples of what you can add via "Create new actions":

Examples of Action Types	What it does
<b>Send data to Airtable / Google Sheets</b>	Add new rows, update project info, log client details.
<b>Search company CRM</b>	Look up client info or order status.
<b>Send an email via gmail or outlook</b>	Draft and automatically send follow-ups.
<b>Pull data from a website or API</b>	Get live financial data, weather, or analytics.
<b>Trigger automation tools</b>	For example, create a Trello card or post to Slack.

**ACTION:** Take these steps to add an Action.

- Click "Create new action" in the Configure tab.
- Define an API endpoint (the app or service you're connecting to).
- Add authentication details (API key, OAuth).
- Write a short description of what the action does (in plain English).
- The GPT then automatically generates the code needed to run that action when a user asks for it.



## 4. Step-by-Step Guide to Building a Custom GPT continued.

### Step 4 - Test, Refine and Iterate

**ACTION:** Test your GPT with varied prompts; adjust wording and file references. Ask it to summarise what it “understood” from your instructions.

*Tip! Continued refining and tweaks will improve your outputs as the GPT builds its knowledge of your requirements.*

#### PwC increases efficiency by 20-50% through GPTs

PwC built custom GPT assistants for assistants for tax review, report generation, and client proposals.

#### Sales Call Booking Increase

After building a Sales Communications GPT to support with more personalised sales follows up, CH4B saw sales follow up call bookings increase dramatically.

Radfield Home Care reduced admin, and saw faster staff onboarding after building GPTs to support these business functions.

### Step 5 - Deploy and Monitor

**ACTION:** Start using your GPT to perform business tasks.

Monitor errors and misunderstandings. Keep improving your GPT if needed.

Remember that version updates for ChatGPT may mean new features are available...why not keep up to date by creating a GPT to keep you in the loop!

**Book a free Strategy Call with CH4B and CH4B will help you identify areas you can automate or optimise using AI.**



## 5. GPT Challenges

93 % of UK firms using generative AI such as ChatGPT report measurable efficiency gains, but AI, including custom GPTs should still be used with caution.

Here, we outline some of the key challenges and things to look out for when integrating AI into your day-to-day business practices.

### Data Privacy & Governance

Especially with internal or sensitive data (e.g. HR, finance). Only use a paid subscription to protect your data from being used to train ChatGPT.

### Quality Control

GPTs can hallucinate or drift in tone; always sense-check outputs. Deloitte issued a partial refund to a client after a report generated by AI was found to contain serious errors.

### Over-scope Risk

Trying to make the GPT do “everything” weakens specific usefulness. It’s better to build small, focused GPTs.

### Cost v’s Benefit

Initial set up may take time, pay-back will happen over time with efficiency. Consider upskilling your team to improve AI knowledge.

## 6. Monetising GPTs.

### Turn custom GPTs into revenue opportunities...

While most SMEs create custom GPTs to streamline operations and cut costs, they can also become powerful new revenue generators. A well-built GPT captures your business's unique expertise, turning it into a product customers will pay to access.

The key is to move from internal efficiency to external value: designing GPTs that solve real problems for your clients, customers, or partners. Here's how you can monetise your custom GPT:

#### STEP 1

Define the knowledge, frameworks, or processes that make your business valuable. Focus on the expertise that clients repeatedly pay for (e.g. a building contractor cost calculator or materials estimator).

#### STEP 2

Build your GPT using the steps outlined previously in this guide. Customise conversation starters and system instructions to reflect your brand's tone and ensure compliance and accuracy, and embed your website and contact details for seamless lead generation.

#### STEP 3

Define the business model - how will you monetise your GPT?

- Subscription/SaaS: Sell paid access through ChatGPT share links or embed in client dashboards.
- Lead Generation: Offer free GPT access with premium features unlocked via your services.
- Embed product value: Add a GPT as a feature within your paid service or membership.

*By strategically packaging your expertise into a Custom GPT, you turn what your business already knows into a scalable digital asset.*

*This approach not only generates new income streams but also strengthens your reputation as an innovator in your sector.*





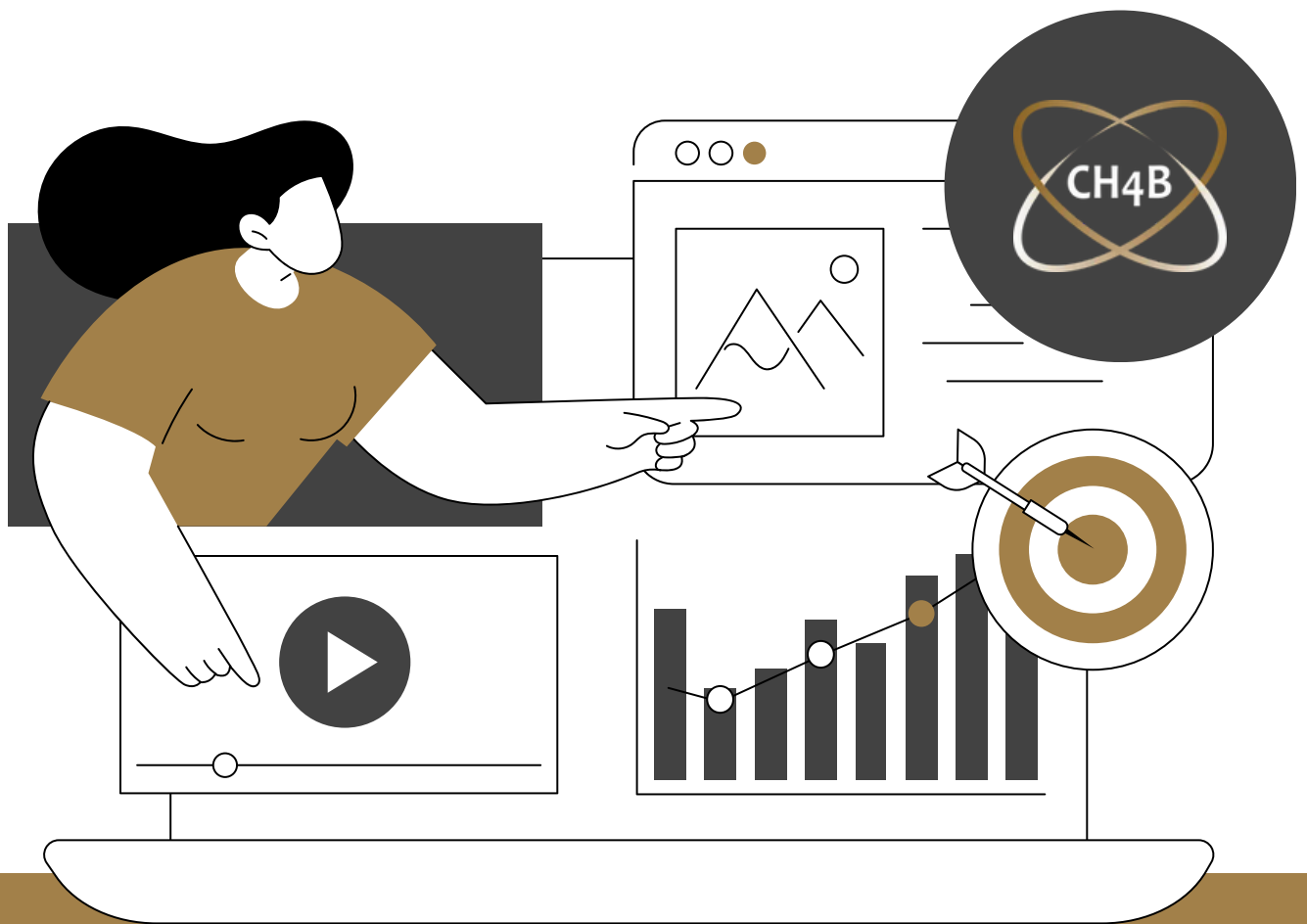
## 6. Monetising GPTs continued.

Examples of how different SMEs can monetise custom GPTs:

Industry	GPT Example	Monetisation Model	Outcome
<b>Consultancy</b>	StrategyGPT trained on your frameworks and client case studies	Subscription or client access	Generates recurring income and strengthens positioning as a thought leader.
<b>Construction / Renewables</b>	Project Feasibility GPT that estimates cost, time, and energy savings	Freemium model – free basic estimates, paid reports	Attracts qualified leads and builds trust pre-sales.
<b>HR / Recruitment</b>	InterviewGPT that trains candidates using your proven question bank	Subscription or one-off access	Creates passive income and enhances brand authority.
<b>Marketing Agency</b>	Brand Voice GPT built on your style guides and tone principles	Add-on for retainer clients	Increases client stickiness and speeds up delivery.
<b>Finance / Accounting</b>	TaxGPT for SMEs that provides general guidance within compliance boundaries	Tiered access – free FAQs, paid consultations	Automates early-stage queries, freeing team time for high-value work.

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We'll share practical, proven steps to save you hours every week.

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