

How to Use the Branded Templates

A practical companion to the MNJ Premier Advisory template pack. Each template records a different decision or check. Use the templates that fit the task; you do not need all eight for every activity.

Template	What it does	When to use it
01 Prompt Design	Build clear, reusable AI instructions.	Before a reusable AI task.
02 Evidence Record	Verify a claim against an original source.	For material factual claims.
03 Prompt Evaluation	Review one AI response and corrections.	For an evaluated AI run.
04 Project Brief	Agree the problem, scope, and success criteria.	At the start of a full project.
05 Test and Evaluation	Test the complete solution across cases.	Before a pilot or after changes.
06 Operating Checklist	Control a recurring run and its approvals.	Every run or reporting cycle.
07 Handoff and Portfolio	Transfer the solution and explain the results.	At handoff or portfolio review.
08 Pilot Offer	Scope a stakeholder/client engagement.	Before committing to a pilot.

Opening and saving your templates

- Download and extract the template ZIP. Keep an untouched master; save a new copy for each project, claim, test, or run.
- In Word, click the response placeholder and replace it with your answer. The document can expand for longer responses.
- In the fillable PDF, use a form-capable reader, type into the fields, and save. Reopen your copy to confirm entries. Use Word if a PDF field scrolls or is too small.
- Repeat the same project or record ID, owner, and date on each page. Link supporting files rather than pasting sensitive information.

[Download the complete template pack](#) | [Open the template directory](#)

TEMPLATE 01 / Weeks 2-3; revisit in weeks 6-12.

Prompt Design and Iteration

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Turn a vague request into clear instructions that an AI assistant can follow, then improve the instructions through a controlled revision.

Use it when: Use before a reusable AI task such as drafting a weekly briefing, extracting facts, writing an email, or analyzing a file.

How often and who: One copy per reusable prompt. Update the version when the instructions change. The task owner completes it; a reviewer checks important outputs.

How to complete it

- 1. Goal and intended user.** Name the deliverable, reader, and decision. Example: a one-page weekly sales briefing for the shop owner.
- 2. Context and approved sources.** List exact inputs and dates. Example: the approved synthetic orders CSV and its data dictionary.
- 3. Constraints and boundaries.** Specify scope, tone, length, privacy, and actions requiring approval. State that missing values must be flagged rather than invented.
- 4. Required output format.** List the sections or columns the response must contain, in order.
- 5. Quality and evidence checks.** Define the calculations, citations, and completeness checks that make the answer acceptable.
- 6. Draft prompt and page two.** Combine the instructions; save the first result; identify one issue; revise the prompt; retest on a new example; record human review.

Illustrative example

Draft instruction: Using only the approved orders file, calculate revenue and gross profit by product. Show the date range, row count, calculations, missing-value issues, and three evidence-based observations. Do not infer a cause for changes from totals alone.

Complete when: The prompt can be reused, its inputs and limits are explicit, and a fresh test produces an acceptable result.

Remember: Template 01 designs and improves the instruction. Use Template 03 when you need a separate, detailed record of an individual AI run.

TEMPLATE 02 / Start in week 3; use whenever later work contains material factual claims.

Evidence and Source Record

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Create a traceable record showing whether a factual claim is supported by an original source.

Use it when: Use for a statistic, factual statement, product comparison, recommendation, or important claim that must be defensible.

How often and who: One copy per material claim. Add further source references when a claim needs several sources. The researcher records it; a reviewer confirms the conclusion.

How to complete it

- 1. Claim ID and exact claim.** Write one precise statement. Avoid combining several different claims into one record.
- 2. Source identity and date.** Record publisher/author, document title, publication date, and the date you checked it.
- 3. Source URL or file reference.** Use a working URL or an exact file/version and page, section, sheet, or cell range.
- 4. Supporting passage and location.** Capture a brief relevant passage or accurate paraphrase. For a calculation, list the source values and formula.
- 5. Evidence assessment.** Check whether the source directly supports the claim, is current enough, and has relevant limitations.
- 6. Conclusion and reviewer.** Mark supported, partly supported, or unsupported. Record a correction and the reviewer/date.

Illustrative example

Illustrative claim C-01: Product A generated 60% of recorded revenue. Source: approved synthetic Product Totals sheet, A revenue 1,200 and total revenue 2,000. Check: $1,200 / 2,000 = 60\%$. This supports a revenue-share statement; it does not establish the most profitable product.

Complete when: Another person can locate the original evidence and reproduce your conclusion.

Remember: An AI-generated citation is a lead to investigate. Open the source and check the actual claim before approving it.

TEMPLATE 03 / Weeks 2-3 and 9; use throughout the capstone.

Prompt Evaluation Record

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Check the accuracy, completeness, and usefulness of one AI response and document the corrections it needed.

Use it when: Use when reviewing a draft, summary, analysis, classification, or other answer from an AI assistant.

How often and who: One copy per evaluated run or test input. Reuse the same task and prompt IDs so the record connects to Template 01.

How to complete it

- 1. Run identity and input.** Record task ID, prompt/version, tool/model, date, and the precise input or saved input reference.
- 2. Expected outcome and checks.** Define the correct answer or criteria before judging the result. Include numerical, factual, and format checks.
- 3. Actual output.** Paste the response or link to a saved copy. Keep the original answer, including errors.
- 4. Errors and human corrections.** State exactly what is wrong and what a reviewer changed.
- 5. Revision and independent retest.** Record the new instruction and result on a fresh example rather than only repeating the original case.
- 6. Final decision and review time.** Accept, revise, or reject. Name the reviewer, total review effort, and any remaining limitation.

Illustrative example

The AI calls Product A the most profitable because its revenue is highest. The file shows A revenue 1,200 and cost 900, while B revenue is 800 and cost 300. Correct result: B has higher gross profit, 500 versus 300. Record the error, revise the prompt, and retest.

Complete when: The answer has a documented review decision, supporting checks, and an honest record of errors and review time.

Remember: This checks a specific AI run. Template 05 checks whether the complete solution works across multiple cases and failure conditions.

TEMPLATE 04 / Introduce when starting a practical project; complete for the week 11 capstone.

AI Project Brief

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Define the problem, boundaries, success measures, data, responsibilities, and costs before building a solution.

Use it when: Use at the start of a project or when the goal, data, design, or scope changes materially.

How often and who: One brief per project; revise its version as decisions change. The learner/project lead drafts it and the project owner reviews it.

How to complete it

- 1. Page one - user and decision.** Describe the user, current problem, desired output, and decision the output should improve.
- 2. Page one - baseline.** Record how the task is performed today, its frequency, time, and known quality problems.
- 3. Page one - scope and success.** Name included work, exclusions, and measurable acceptance criteria.
- 4. Page two - data and design.** Record data ownership, permission, sensitivity, retention, tools, dependencies, and manual steps.
- 5. Page two - cost and controls.** Include setup effort, recurring subscriptions/usage, review/maintenance time, failure cases, approvals, and recovery owner.
- 6. Page two - delivery and approval.** Agree deliverables, milestones, accountable owner, reviewer, and approval date.

Illustrative example

Project: a weekly sales briefing for a fictional shop. Baseline: a manual summary takes 40 minutes in this learning example.

Scope: read the approved file and create a draft report; exclude changing orders or sending customer messages. Acceptance: totals reconcile, missing inputs are flagged, and the owner approves the draft.

Complete when: The owner and builder agree on the problem, scope, data permission, deliverables, and what success will mean.

Remember: The template numbers are labels, not a required order. For a full project, begin with Template 04.

TEMPLATE 05 / Weeks 7-10 and the final capstone assessment.

Test and Evaluation Record

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Test the complete solution against normal inputs, edge cases, and failures before recommending a pilot or release.

Use it when: Use after building a prototype, after a material change, and before relying on the workflow.

How often and who: Duplicate page one for each test case. Complete page two once for the full evaluation set. Link case IDs and version references.

How to complete it

- 1. Page one - case and starting state.** Record the case ID/type, solution version, tester, date, exact input, and prerequisites.
- 2. Page one - expected result.** Write the pass rule before running. A correct safe stop can be the expected outcome for a bad input.
- 3. Page one - observed result.** Capture the output, evidence, timings, errors, and whether the case passed, failed, or was blocked.
- 4. Page one - correction and retest.** Assign the fix, record the new version, retest, and note residual risk.
- 5. Page two - overall results.** List case IDs and coverage, summarize passed/failed/blocked counts, analyze important errors, and compare the baseline.
- 6. Page two - recommendation.** Include review/maintenance time, costs, sample limits, untested conditions, and a proceed/pilot/revise/stop decision.

Illustrative example

T-01 normal file: totals match the source. T-02 missing cost column: flag the missing field and withhold profit claims. T-03 duplicate order ID: flag it for review without double-counting. T-04 unavailable file: stop with a clear error. T-05 connector failure: log the failure and leave the draft unsent.

Complete when: The agreed acceptance criteria are met, important failures are understood, and the reviewer records a release recommendation.

Remember: One successful demonstration does not prove reliability. Keep failed cases and distinguish observed results from estimates.

TEMPLATE 06 / Week 10 onward, whenever the workflow is operated.

AI Workflow Operating Checklist

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Make repeated operation consistent by checking inputs, outputs, approvals, and recovery steps for each run.

Use it when: Use each time an approved workflow or reporting process is run.

How often and who: One copy per run or reporting cycle. The operator completes it and records the required human review.

How to complete it

- 1. Before the run.** Confirm the approved source, permissions, version, required fields, row counts, and tool limits.
- 2. During the run.** Watch status, duplicate IDs, connector errors, and credit/API usage.
- 3. Before acting on the result.** Verify important facts and calculations, then obtain the named approval before consequential actions.
- 4. After the run.** Save inputs and outputs, record corrections, check access/recipients, and retain recovery instructions.
- 5. Stop and recovery instructions.** State when to stop, how to disable the workflow, which inputs to restore, and who owns recovery.
- 6. Run outcome and approval.** Record run ID/date, completed/exception/stopped status, reviewer, approval reference, and follow-up.

Illustrative example

Run R-07 finds that the input file lacks a cost column. Mark an exception, stop the profit calculation, save the error log, and ask the data owner for a corrected file. Resume only after the input check passes; do not guess the missing costs.

Complete when: Every stage has a recorded outcome, exceptions are explained, and the required approval is traceable.

Remember: Word includes Completed, Exception, and Not applicable options. In the PDF, a checkbox marks completion; leave it unchecked and explain an exception or N/A in the response area.

TEMPLATE 07 / Weeks 11-12 and subsequent workplace or client pilots.

Project Handoff and Portfolio

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Transfer the working solution to another person and turn the work into a clear, evidence-based portfolio case study.

Use it when: Use when the project is ready for another person to run, support, review, or assess.

How often and who: One handoff per solution version or major release. The outgoing owner prepares it; the receiving owner confirms acceptance.

How to complete it

- 1. Page one - ownership and files.** Name solution/version, business/technical owners, support contact, folders, dependencies, and access process.
- 2. Page one - operation and controls.** Explain prerequisites, run steps, output interpretation, checks, approvals, stop/recovery, and retention.
- 3. Page one - acceptance.** Record the walkthrough, receiving reviewer, open issues/owners, acceptance, and next review date.
- 4. Page two - case study.** Describe problem/baseline, design, evidence choices, tests, failures, measured outcomes, costs, and limitations.
- 5. Page two - assets and next steps.** Link sanitized working files, sample inputs/outputs, screenshots, a short demo, and improvement priorities.
- 6. Page two - project bullet.** Write a truthful summary of what you built and measured. Label a learning project or synthetic dataset explicitly.

Illustrative example

Handoff: the reviewer opens the approved file, runs the notebook, checks totals, and prepares the draft briefing. Portfolio wording: Built a learning prototype using synthetic order data; reconciled product totals and tested missing-field and duplicate-record handling. Add numerical outcomes only if your own tests support them.

Complete when: The receiving person can reproduce a result without relying on your memory, and your case study distinguishes evidence from assumptions.

Remember: Link access instructions rather than passwords or API keys. Portfolio copies should contain only approved, sanitized material.

TEMPLATE 08 / Optional in weeks 11-12; use before a stakeholder or client pilot.

AI Pilot Offer

[Download editable Word](#) | [Download fillable PDF](#)

What it does

Define a small, bounded pilot for a client or stakeholder, including deliverables, responsibilities, costs, and acceptance.

Use it when: Use when proposing a real pilot, before agreeing to deliver work. It is optional for learners who only want personal productivity skills.

How often and who: One offer per proposed pilot; update it when scope, timing, price assumptions, or responsibilities change.

How to complete it

- 1. Client or user and need.** Identify the intended user, pain point, decision, and desired value.
- 2. Deliverables and exclusions.** Name concrete outputs, boundaries, data/access assumptions, and excluded work.
- 3. Timeline and checkpoints.** List milestones, the client and builder responsibilities, review points, and handoff.
- 4. Price assumptions and tool costs.** State proposed fee assumptions, setup effort, recurring charges, and who pays for each tool or usage cost.
- 5. Success measure and acceptance.** Define the tests, evidence, and decision needed to accept the pilot.
- 6. Controls and agreement.** Record permission, human approval points, support limits, named approver, and agreement date.

Illustrative example

Offer a two-week draft-reporting pilot using an approved sample of order data. Deliver a reconciled dashboard, a draft briefing process, a test log, and a walkthrough. Exclude production-system changes and automatic customer communications. Fill in the fee only after estimating scope, effort, and tool charges.

Complete when: Both sides understand what will be delivered, what is excluded, how results will be judged, and who approves and pays.

Remember: Template 08 proposes the engagement; Template 04 turns the approved pilot into an operational project brief. Revisit both if the scope changes.

How the Templates Work Together

The following fictional shop example uses synthetic data. All amounts, times, and outcomes below illustrate the method; they are not results from a real client or a promise of savings.

Start with the decision, then build and verify

04 Project Brief. Define a weekly sales briefing that identifies top products by revenue and gross profit. Record the manual baseline, approved input, scope, and acceptance criteria.

01 Prompt Design. Specify the input columns, metric formulas, output format, missing-data behavior, and required checks. Save the reusable prompt and its version.

02 Evidence Record. Verify a material statement: A revenue is 1,200 out of 2,000 total, so its share is 60%. Name the sheet/range and record the calculation.

03 Prompt Evaluation. Review the AI answer. If it confuses highest revenue with highest profit, correct it: A gross profit is $1,200 - 900 = 300$; B is $800 - 300 = 500$. Retest after revising the instruction.

05 Test and Evaluation. Test a normal file, missing cost column, duplicate order ID, unavailable file, and connector failure. Record expected outcomes before running and retain failed cases.

06 Operating Checklist. For each weekly run, confirm inputs, monitor errors and usage, reconcile the draft, and get human approval before distribution.

07 Handoff and Portfolio. Give another person the run instructions and files. Ask them to reproduce one result. Record measured outcomes and show a sanitized demonstration.

08 Pilot Offer. Use only if proposing the approach to a stakeholder or client. Agree a small scope, timeline, deliverables, tool costs, and acceptance before promising delivery.

Choose a lighter set for a small task

For a simple drafting task, start with 01 and use 03 to check the result. Add 02 when the draft contains factual claims. For recurring or consequential workflows, add the project, testing, operating, and handoff records. Use 08 when proposing an engagement.

Keep the records connected

Use consistent identifiers, such as project SALES-01, prompt P-01 v2, claim C-01, test T-03, and run R-07. A practical filename is SALES-01_T05_T03_v2_2026-10-18.pdf. Record corrections and reviewer decisions so the final result can be traced to the evidence.

Prepared by MNJ Premier Advisory | Companion to template pack edition 1.1 | 18 October 2026