

Set Up a Prospect Research Project in ChatGPT:

Step-by-Step Guide

Practical checklist and templates • Last updated: August 15, 2025

Who this is for & prerequisites

Use this guide to configure a dedicated **Project** in ChatGPT for repeatable, on-topic prospect research work. Projects keep related chats, files, and instructions together. You'll create a project, upload your research templates/data, and add instructions so ChatGPT works in your context.

What you need:

- A ChatGPT plan with Projects (Plus, Pro, Team, Enterprise, or Edu).
- Your existing prompts and documents (research template, data dictionary, ethics/policy notes, sample exports).

1) Create your Project

1. Open ChatGPT and click **New project** in the sidebar.
2. Name it clearly, e.g., *"Prospect Research — XYZ College"* or *"Prospect Research — ClientName."*
3. Optionally add a short description (purpose, data sources, and outcome).

2) Add files (your core context)

In the project's Files area, click **Add files**

Suggested uploads:

- Prospect Research Profile Template (DOCX/PDF)
- Prompts Library (DOCX/PDF) — your vetted prompts and workflows
- Data Dictionary (CSV/DOCX) — field names, definitions, and caveats
- Wealth Screening Exports (CSV/XLSX) — e.g., iWave/Kindsight, Blackbaud indicators
- Constituent & Giving History (CSV/XLSX) — de-identified where possible
- Board & Affiliations (CSV) — boards, committees, advisory councils
- Event Attendance / Ticketing (CSV) — recency and engagement
- Ethical Guidelines & Privacy Policy (PDF)

Tips:

- Keep file names unambiguous (e.g., *"Giving_History_2019_2024_v2.xlsx"*).
- Upload only the files ChatGPT needs; remove stale versions to stay under limits.



- When you ask a question, reference relevant file names (“use Giving_History_2019_2024_v2.xlsx”).

3) Add Project Instructions (once, then reuse)

Add a short, durable instruction set so ChatGPT stays in role and uses the correct sources. Paste and customize the template below.

Template — Project Instructions

- Role & Goal: Act as a senior prospect research analyst for [ORG]. Produce accurate, source-based insights and concise outputs formatted to our template.
- Scope: Use only the uploaded files and public web sources. Flag uncertainties and cite sources when summarizing public info.
- Tone & Format: Professional, neutral, and concise. Use headings and bullet points. When creating research profiles, fill every section and mark unknowns as “Not found.”
- Data Sensitivity: Do not disclose private data. Prefer conservative assumptions; avoid capacity estimates without support.
- File Awareness: Before answering, check relevant project files. If multiple versions exist, ask which to use or pick the newest by file name.
- Limits & Ethics: Respect privacy and applicable laws. Summarize rather than storing PII beyond what’s provided.

4) Move existing chats into the Project (optional)

4. From the chat list, drag a chat into your Project folder; or use the chat’s ••• menu → Move to project.
5. Once moved, the chat now uses this Project’s files and instructions.

5) Configure memory & model

Recommendations:

- Enable memory for your account if you want ChatGPT to remember preferences across the project.
- Plus/Pro: Turn on both “Reference saved memories” and “Reference chat history” so ChatGPT can leverage previous chats within the project.
- Pick a capable model (e.g., GPT-4-class or newer) for analysis; switch models per chat if needed.

6) Work inside the Project

Common actions:

- Run deep research to compile a landscape scan that blends your files with web sources.
- Open Canvas to draft a Research Profile or an outreach brief with inline editing.
- Use Image generation for quick org charts or affiliation visuals (if helpful).
- Share a single chat via link when you need feedback (only that chat is shared, not files).



Prospect Research quick-start workflow

6. Create a new chat in your Project and paste your starter prompt.
7. Tell ChatGPT which files to use (by name) and what to produce (e.g., “Fill the Prospect Research Profile Template for <Name>”).
8. Ask for a one-paragraph summary first, then the full profile. This keeps the work on track.
9. Request citations for any public-web facts and a list of what remains unknown.
10. Export or paste results into your DOCX template and save back to your records.

Maintenance cadence (keep your project healthy)

- Weekly: Upload new exports (giving, ticketing) and archive outdated versions.
- Monthly: Review and refresh Project Instructions; add new definitions/edge cases.
- Quarterly: Purge old chats you don’t need and prune duplicate files.

Troubleshooting

- Model ignores a file? Reference it by exact name and ask it to summarize the file first.
- Hit file count limits? Combine older exports or split work across multiple projects.
- Off-topic answers? Re-open with your starter prompt and re-state the instructions inline.

One-page checklist

- Create Project → Name it clearly.
- Upload core files (template, prompts, dictionary, exports).
- Add Project Instructions (role, scope, tone, data rules).
- Enable memory + chat history referencing (Plus/Pro).
- Start a new chat → reference specific file names.
- Ask for a short outline first → then the deliverable.
- Share chat link for review (if needed).
- Maintain weekly/monthly/quarterly cadence.



