

AI Prompt Library for Customer Experience Teams

Get Better AI Results With Ready-to-Use CX Prompts

An adaptable collection of practical prompts, worked examples, exercises, planning worksheets, and responsible-use guidance for everyday customer experience workflows.

Workbook details	Your notes
Team / organisation	_____
Primary CX workflow	_____
Owner / review date	_____

What this library helps you do

Draft clear, empathetic, policy-aligned customer responses.

Turn unstructured feedback into themes and follow-up questions.

Summarise support conversations and prepare reliable handovers.

Improve help articles and FAQs using approved source material.

Identify journey friction and generate testable service improvements.

Build a shared prompt library with owners, quality checks, and review dates.

Important: AI output is a draft, not an automatic decision. Use approved tools, minimise personal data, verify factual claims, and review customer-facing content before use.

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1. Introduction

1.1 What is AI prompt engineering in customer experience?

Prompt engineering means giving an AI system clear instructions, relevant context, boundaries, and an output format so the result is more useful for a specific task. In CX, that could mean drafting a complaint response, grouping survey comments, summarising a support case, simplifying a help article, or identifying journey friction.

A good prompt reduces ambiguity; it does not guarantee correctness. Output quality still depends on the source information, the tool, the task, and human review.

1.2 How effective prompts improve CX workflows

Task	Prompt helps by...	Human judgement still needed
Customer responses	Defining tone, facts, next step, and policy boundaries.	Empathy, exceptions, commitments, escalation.
Feedback analysis	Setting categories and requiring evidence and caveats.	Representativeness, severity, strategic interpretation.
Support summaries	Extracting issue, actions, status, promises, and open tasks.	Correct case history, ownership, unresolved risks.

Knowledge content	Clarifying audience, source material, and structure.	Product accuracy, policy meaning, compliance wording.
Journey improvement	Organising observations and generating testable options.	Customer validation, feasibility, prioritisation.

1.3 Who should use this library?

Support agents drafting replies and case notes.

CX and customer success teams analysing feedback and friction.

Knowledge managers and content teams maintaining help centres.

Team leads improving consistency, handovers, and quality.

Researchers and service designers preparing research and journey maps.

1.4 How to use the prompts

Choose a prompt that matches the task and its risk level.

Replace bracketed placeholders with accurate, approved context.

Remove or mask personal data that is not required.

Supply a current trusted source for policy, price, or product facts.

Review the result against Section 6 before use.

Record effective changes in the shared library instead of repeatedly fixing the same prompt.

These are templates. Adapt them to your terminology, approved policy language, brand voice, and escalation routes. Do not enter confidential customer data unless the tool and use are approved.

2. The Five-Part Formula for Effective CX

Prompts

A reliable prompt makes five things explicit: role, context, task, format, and limits.

Simple tasks may need fewer words, but these five parts are a useful quality check.

Part	What to specify	CX example
Role	Perspective the AI should apply.	Act as a support writing assistant using a calm, respectful tone.
Context	Customer situation, goal, channel, verified facts.	Customer received a damaged item; supplied policy permits replacement.
Task	Exact action and deliverable.	Draft a response acknowledging the issue and explaining next steps.
Format	Tone, length, structure, language.	120–160 words, plain language, short paragraphs, one clear next step.
Limits	What must not be assumed, disclosed, or promised.	Do not invent delivery dates, offer unapproved compensation, or request payment details.

Reusable prompt template

Copy and customise

ROLE: Act as [role or specialist perspective].

CONTEXT: [Customer situation, goal, channel, verified facts, and approved source material.]

TASK: [Exactly what the AI should produce or analyse and the outcome needed.]

FORMAT: [Tone, length, structure, language, reading level, and required fields.]

LIMITS: [What must not be assumed, disclosed, changed, or promised. Explain when to flag uncertainty or request human review.]

QUALITY CHECK: Before finalising, check [task-specific success criteria]. If key information is missing, list it or ask a clarifying question instead of inventing details.

Customisation tip: Keep only relevant instructions. For policy-sensitive tasks, provide the authoritative source and an explicit escalation rule.

Quick prompt checklist

Would a colleague understand the requested output?

Is context sufficient but not excessive?

Are trusted sources identified?

Is the output structure clear?

Are boundaries around assumptions, privacy, policy, and commitments explicit?

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3. Ready-to-Use AI Prompts for CX Teams

Replace bracketed text before using a prompt. Supply only the information required, and verify all customer-facing content.

3.1 Customer response and support prompts

1. Respond to a customer complaint

Use when: A customer is unhappy and needs a policy-aligned response.

ROLE: Act as a customer support writing assistant.

CONTEXT: Customer concern: [issue]. Verified facts: [facts]. Approved policy/options: [policy excerpt]. Steps already tried: [steps].

TASK: Draft a response acknowledging the specific concern, showing understanding, explaining what can be done, and giving a clear next step.

FORMAT: [warm/formal/concise] tone, plain language, [word limit] words. Structure: acknowledgement, response, next step, closing.

LIMITS: Do not blame the customer, speculate about the cause, promise an unsupported outcome, or repeat sensitive data. If facts are insufficient, list missing details first.

Customisation tip: Use the actual concern in a privacy-safe summary; generic prompts produce generic empathy.

2. Apologise for a service issue

Use when: Outages, delays, missed appointments, or service failures.

Draft an apology for [service issue]. Confirmed impact: [impact]. Actions taken: [actions]. Known facts: [facts]. Unknowns: [unknowns].

Acknowledge the inconvenience directly. Explain what is known and what happens next. Mention an update time only if approved. Use [brand tone], under [word count] words.

Do not minimise the impact, blame an individual, claim resolution before it is confirmed, or invent a timeline. Flag any statement requiring approval.

3. Explain a policy clearly

Use when: A policy is accurate but difficult to understand.

Rewrite this approved policy excerpt for a customer asking about [topic].

SOURCE: [paste policy]

Explain the main rule, who it applies to, stated conditions/exceptions, and what the customer should do next. Use plain language at [reading level]. Preserve the meaning; do not add exceptions or remove conditions. List unclear points requiring policy-owner confirmation.

4. Handle a refund or replacement request

Use when: Requests that depend on eligibility rules or a defined process.

Prepare a draft response to a request for [refund/replacement] relating to [issue].

Verified facts: [non-sensitive facts]. Approved policy: [source]. Available options: [confirmed options]. Missing information: [details].

First determine whether the supplied facts are sufficient to identify the next step. If not, list missing information and do not decide eligibility. If sufficient, draft a response explaining the supported option and next action.

Do not approve exceptions, state amounts, promise processing times, or claim eligibility unless the source supports it.

5. Personalise a response for a customer situation

Use when: The core answer is the same but communication needs adapting.

Adapt this approved base response for [situation: first-time customer, repeat contact, time-sensitive issue, or customer needing simpler language].

BASE RESPONSE: [text]

Verified context: [relevant facts only]. Brand voice: [guidelines]. Required facts: [facts that must remain unchanged].

Keep facts, policy conditions, and next steps consistent. Adjust tone and emphasis only. Do not infer age, ability, emotions, or background. Return the revised response and a brief note on what changed.

3.2 Customer feedback analysis prompts

6. Analyse survey responses

Use when: Open-text survey feedback.

Analyse anonymised survey responses.

BUSINESS QUESTION: [question]. DATA: [responses]. CONTEXT: [survey wording, period, segment, sample size, method].

Identify recurring themes, positive and negative signals, and paraphrased examples.

Count mentions only where countable. Separate observation from interpretation.

Note ambiguous comments, sample limitations, and follow-up research questions.

Do not invent quotes, claim representativeness without evidence, infer personal attributes, or claim causation from comments alone. Output a table: theme, evidence, count/frequency, possible impact, follow-up question.

7. Identify recurring complaints

Use when: Complaint logs, tickets, reviews, and recurring service issues.

Review anonymised complaints from [period/channel]: [data].

Group into categories. For each, provide definition, count if possible, customer impact, anonymised/paraphrased example, and possible root-cause hypotheses. Separate facts from hypotheses. Highlight high-severity issues even if rare. Do not infer root cause from frequency alone; recommend human validation where needed.

8. Categorise feedback by sentiment

Use when: Consistent first-pass feedback tagging.

Classify each anonymised item as positive, neutral, negative, mixed, or unclear. Assign one topic from [approved taxonomy].

DATA: [items with neutral IDs].

Return ID, sentiment, topic, supporting evidence phrase, confidence (high/medium/low), and human-review flag. Treat sarcasm and ambiguous short comments cautiously. Do not infer sentiment from identity. Explain taxonomy mismatches.

9. Extract customer pain points

Use when: Journey mapping and service-design workshops.

From this anonymised feedback [data], identify explicitly described pain points.

Context: [journey/product].

For each, provide customer task, what makes it difficult, evidence, likely stage/touchpoint, severity signals, and evidence needed to confirm scale. Do not invent experiences, generalise from one comment, or present possible causes as facts. Separate pain points from solution ideas.

10. Summarise satisfaction trends

Use when: CX reviews and management summaries.

Summarise satisfaction data for [period] versus [comparison period].

DATA / DEFINITIONS: [aggregated results, sample sizes, survey wording, metric definition]. SEGMENTS: [approved segments].

Report overall movement, segment differences, comment themes, possible explanations, limitations, and three follow-up questions. Calculate only what the data supports. Do not claim causation without evidence. Flag small samples or changed survey methods.

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3.3 Customer support summary prompts

11. Summarise a long support conversation

Use when: Case transfer or long conversations.

Summarise this approved/anonymised conversation: [text].

Return: main issue, desired outcome, key facts, troubleshooting completed and results, actions taken, current status, promises/follow-ups, open questions/next actions, and escalation indicators.

Use neutral concise language. Distinguish customer-reported facts from verified facts.

Do not add a resolution absent from the conversation. Label unclear details as unclear.

12. Extract concerns and resolutions

Use when: Case audits and recurring issue analysis.

From these case notes [notes], create a table with customer concern, evidence/symptom, troubleshooting performed, result, confirmed resolution, unresolved concern, and next step. Mark each item confirmed, customer-reported, or unverified where possible. If no resolution is documented, write 'not documented'.

13. Prepare handover notes

Use when: Transfers between support tiers or departments.

Prepare handover notes for [receiving team/role] about case [approved case ID].
Notes: [approved notes]. Transfer reason: [reason]. Required action/deadline: [if verified].
Include context, customer goal, verified facts, steps tried, status, open questions, receiving team's action, urgency rationale, and who updates the customer. Keep under [word limit]. Do not include unnecessary personal data or invent an SLA. Flag missing ownership.

14. Identify outstanding actions

Use when: Shift changes, case reviews, and queue checks.

Review these approved/anonymised notes: [notes]. Extract every open action into a checklist with action, owner if stated, dependency, due date if stated, customer update

required, and status. Mark unstated owners/dates as 'not specified'. Separate completed and open actions. Flag customer promises without an owner; do not create deadlines absent from the source.

15. Create a concise interaction summary

Use when: Consistent case notes and customer history.

Create an internal summary for [CRM/case history/team update] from [approved notes].

Maximum length: [word count]. Required fields: [issue, action, outcome, next step].

Use neutral factual language. Retain details needed for continuity; exclude unnecessary sensitive data, speculation, and judgemental descriptions. State clearly if unresolved. Flag unclear facts separately.

3.4 Knowledge base improvement prompts

16. Simplify a complex help article

Use when: Accurate content that is hard to scan.

Rewrite this approved article for customers completing [task].

SOURCE: [article]. AUDIENCE: [customer type/knowledge level].

Use plain language, short sentences, descriptive headings, and numbered steps.

Preserve all facts, warnings, eligibility conditions, and policy requirements. Do not

add instructions or features absent from the source. List unclear or contradictory source statements requiring an owner.

17. Update an FAQ for clarity

Use when: FAQ refreshes and help-centre audits.

Review this approved FAQ: [text]. Customer search intent/task: [task].

Identify unclear or duplicate questions, missing steps, jargon, and answers that do not address the question. Propose revised Q&A pairs using only supplied source facts.

Mark missing information 'owner confirmation required'. Keep answers concise, actionable, and consistent in terminology.

18. Identify missing information

Use when: Content audits and new support guidance.

Audit this article for customers completing [task]. ARTICLE: [text]. AUDIENCE: [audience]. SUPPORTING SOURCE: [approved source].

Check prerequisites, permissions, steps, expected result, common errors, recovery, time-sensitive conditions, and further help. Return a gap table: missing/unclear information, evidence, customer risk, source needed, recommended owner. Do not invent product behaviour.

19. Convert policy into customer-friendly guidance

Use when: Making policies easier to understand.

Convert this approved policy into guidance.

POLICY: [exact source]. CUSTOMER QUESTION: [question]. AUDIENCE/CHANNEL: [details].

Return a direct answer, key conditions, customer action, what happens next, and where to get help if the situation is not covered. Preserve all material limitations. Do not create rights, exceptions, guarantees, fees, or deadlines. Reference source sections when available.

20. Check consistency against source material

Use when: Policy-sensitive content before publication.

Compare DRAFT [text] with AUTHORITATIVE SOURCE [approved source/version].

Do not rewrite first. Create a discrepancy table: draft statement, matching source section, status (supported/contradicted/not found/ambiguous), risk, recommended correction or owner confirmation. Identify claims absent from the source. If the source is incomplete or contradictory, flag it separately.

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3.5 Customer journey and experience improvement prompts

21. Identify friction in a customer journey

Use when: Journey mapping after collecting evidence.

Analyse journey notes from the customer's perspective.

JOURNEY/SEGMENT: [details]. GOAL: [goal]. NOTES/EVIDENCE: [touchpoints, behaviour, feedback, metrics].

Identify friction related to effort, uncertainty, waiting, repetition, accessibility, trust, or hand-offs. For each, state stage, customer impact, supporting evidence, confidence, causes to test, and research question. Separate facts from hypotheses and do not assume everyone follows the same path.

22. Brainstorm service improvement ideas

Use when: Generating a balanced range of possible solutions.

Pain point: [verified issue]. Customer segment/task: [details]. Evidence: [known facts]. Constraints: [budget, technology, policy, accessibility, staffing]. Desired outcome: [customer/business measure].

Suggest options including removing steps, simplifying language, improving visibility, changing hand-offs, self-service, human support, or process changes. For each state benefit, effort, dependency, risk, and test method. Do not treat ideas as proven or shift unnecessary effort to customers.

23. Analyse a touchpoint

Use when: Checkout, onboarding, escalation, renewal, or another specific moment.

Review touchpoint [touchpoint/channel]. Customer task: [task]. Evidence: [comments, metrics, observations]. Current process: [steps/hand-offs].

Describe customer needs, where the experience may break down, evidence-supported observations, unknowns, and up to [number] improvement hypotheses.

For each give validation method and success metric. Flag accessibility, privacy, security, or policy concerns.

24. Improve self-service

Use when: Repeated contacts for tasks that might be self-serviceable.

Evaluate self-service for customers trying to [task].

MATERIALS: [approved article, FAQ, search terms, anonymised failed-search data].

CONTEXT: [audience/device/known needs]. BOUNDARIES: [allowed actions and escalation rules].

Assess findability, clarity, completeness, step order, error recovery, accessibility, and access to human help. Prioritise gaps by evidence, customer impact, change, risk, and test method. Do not invent features or imply self-service should replace human support for sensitive or complex cases.

25. Develop customer research questions

Use when: Planning customer interviews, surveys, or usability sessions.

Design a short research guide for [research question]. Segment: [segment]. Existing evidence: [knowns]. Decision to inform: [decision]. Method: [interview/survey/usability test].

Create neutral, non-leading questions about recent behaviour, context, barriers, workarounds, expectations, and outcomes. Add follow-up probes and a closing question. Explain what each question explores. Avoid unnecessary sensitive disclosures or presuming a problem exists. Separate exploratory interview questions from quantitative survey questions.

4. Weak Prompts vs Effective Prompts

Weak prompts are vague, omit context, or leave the model to guess the desired output and boundaries. Strong prompts are specific enough to be testable without being long for its own sake.

Example 1 — Complaint handling

Element	Example
Weak prompt	"Reply to this angry customer."
Why it may fail	No issue details, verified facts, resolution options, tone, or policy limits; output may be generic or promise something unauthorised.
Improved prompt	Act as a support writing assistant. Customer is upset because [verified issue]. Facts: [facts]. Approved options: [policy]. Draft a calm reply acknowledging impact, explaining the supported next step, and asking only for genuinely missing information. Use plain language under 150 words. Do not invent refunds, deadlines, causes, or exceptions. Flag approval needs.
Why it is stronger	Specifies context, output, tone, and limits.

Example 2 — Feedback analysis

Element	Example
Weak prompt	“Analyse these reviews and tell me what customers think.”
Why it may fail	No question, categories, sample context, evidence standard, or uncertainty handling.
Improved prompt	Analyse anonymised reviews from [period] about [topic]. Group recurring themes, count mentions where possible, provide paraphrased evidence, and separate explicit feedback from possible explanations. Note positive and negative signals, sample limitations, ambiguous comments, and follow-up questions. Do not infer causation or representativeness without evidence.
Why it is stronger	Creates a consistent structure and guards against overconfident conclusions.

Example 3 — Knowledge base

Element	Example
Weak prompt	“Make this help article better.”

Why it may fail	“Better” is undefined; AI may shorten too much or add unsupported instructions.
Improved prompt	Rewrite this article for customers completing [task]. Use short sentences, descriptive headings, and numbered steps. Preserve all facts, warnings, eligibility rules, and policy conditions. Use only the supplied source; do not add features or deadlines. List missing or contradictory source information requiring confirmation.
Why it is stronger	Defines audience, editing goals, source of truth, and how to handle gaps.

Try it yourself

Weak prompt you often use or see:

What is missing or ambiguous?

Rewrite using role, context, task, format, and limits:

What will you check in the output?

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5. Customise Prompts for Your Workflow

5.1 Replace placeholders with relevant context

Vague instruction	More useful version	Why it helps
Reply to the customer.	Draft a reply to a customer whose delivery arrived two days later than the confirmed date. Current status: [verified status].	Adds issue and factual context.
Analyse feedback.	Group 240 anonymised post-onboarding comments from Q3 into themes and report counts where possible.	Defines dataset and task.
Summarise the case.	Summarise issue, troubleshooting, confirmed result, open actions, and next owner.	Protects handover continuity.

5.2 Adjust tone to the situation

Situation	Tone guidance	Avoid
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Complaint/service failure	Direct, empathetic, accountable, specific.	Defensiveness or minimising impact.
Policy explanation	Clear, neutral, respectful, plain language.	Jargon or ambiguous conditions.
Urgent issue	Calm, concise, action-oriented.	Long explanations before next steps.
Positive feedback	Warm and appreciative.	Generic enthusiasm or assuming testimonial permission.
Sensitive issue	Careful, factual, respectful; route to qualified staff.	Speculation or unsupported reassurance.

5.3 Specify the output format

Email/chat: greeting, acknowledgement, answer, next step, closing.

Analysis: theme, evidence, frequency, confidence, follow-up question.

Case summary: fixed fields and word limit.

Action plan: action, owner, dependency, due date, success measure.

Content audit: issue, location, risk, suggested edit, source to verify.

5.4 Add examples to guide the AI

A short approved example can guide tone and structure. Use anonymised examples, and make clear that the new output must use the new facts rather than copying facts from the example.

Reusable style-example instruction

Follow the structure and style of this approved example, but do not copy its facts.

EXAMPLE INPUT: [anonymised input]

EXAMPLE OUTPUT: [approved output]

PRESERVE: [tone, structure, terminology]

NEW INPUT: [current task and facts]

Create a new output using only the new input and approved sources. If a fact is missing, do not borrow it from the example.

5.5 Refine prompts based on output quality

Name the exact failure: missing fact, wrong tone, unsupported claim, poor structure, or excessive length.

Change one or two instructions at a time.

Retest on varied examples, including an edge case.

Ask a reviewer to use a defined rubric.

Save the successful version, owner, review date, and known limitations.

Observed issue	Adjustment to test
Too generic	Add customer goal, verified facts, and required next step.
Invented policy details	Provide authoritative source; require unsupported points to be flagged.
Too long	Set a word limit and name essential fields.
Insincere tone	Describe observable tone behaviours and provide an approved example.
Overstates a trend	Require counts, sample context, limitations, and alternative explanations.
Drops actions from summaries	Use required fields and test against known cases.

6. Reviewing AI-Generated Outputs

Review AI-generated content before sending it to a customer, publishing guidance, or using analysis to make decisions. The higher the impact of an error, the stronger the review should be.

Review area	Questions	Warning signs
Accuracy	Are names, dates, amounts, product details and steps supported by a trusted source?	Plausible details absent from source.
Policy / commitments	Are eligibility, refunds, timeframes and promises approved?	Invented exceptions, guarantees, deadlines.
Tone / empathy	Does it acknowledge the actual concern respectfully?	Blame, minimisation, robotic sympathy.
Clarity	Can the customer understand the answer and next step?	Jargon, vague instructions, competing actions.
Completeness	Does it answer the actual question and preserve open actions?	Polished answer that misses a key concern.

Assumptions	Are facts separate from hypotheses? Is uncertainty visible?	Confident unsupported claims.
Privacy / fairness	Is unnecessary data removed and language respectful?	Sensitive data repeated unnecessarily or biased wording.
Escalation	Does the case need an authorised specialist?	High-impact issue treated as routine copywriting.

Output review scorecard

Criterion	1 — Not acceptable	3 — Revise	5 — Meets standard	Score
Accuracy	Material errors	Some claims unverified	Material claims supported	___/5
Relevance	Misses need	Partially answers	Directly addresses need	___/5
Tone	Inappropriate	Some awkward wording	Respectful and suitable	___/5

Clarity	Hard to act on	Some ambiguity	Clear and actionable	__/5
Policy/privacy	Boundary violated	Needs confirmation	Meets approved rules	__/5
Completeness	Critical gaps	Non-critical gaps	Required fields included	__/5

Any material accuracy, policy, privacy, safety, or fairness concern means the output is not ready regardless of total score.

Human review and escalation criteria

Refunds, exceptions, financial commitments, legal terms, or policy interpretations outside standard guidance.

Threats, safety concerns, abuse, discrimination, or other sensitive situations.

Security incidents, suspected fraud, privacy requests, or unauthorised access reports.

Conflicting sources, missing critical facts, or decisions affecting customer rights, money, access, or safety.

Repeated failed attempts, high-severity complaints, or an explicit request for a human.

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7. Responsible AI Use in Customer Experience

7.1 Protect personal and confidential data

Use the minimum information required. Where possible, replace names, email addresses, phone numbers, addresses, account identifiers, payment details, authentication information, and other identifiers with neutral labels. Follow data classification, retention, and approved-tool rules. Masking names alone may not be sufficient if other details identify the person.

Never paste passwords, authentication codes, full payment details, or secrets into prompts.

Use approved redaction methods for transcripts and feedback.

Check the tool is approved for the data classification and intended use.

Do not assume a tool is approved simply because it is available.

7.2 Use approved AI tools

Tools can differ in data handling, access, retention, and administrative controls. Use the environment authorised for your task. If unsure whether customer data can be entered, ask the security, privacy, or AI governance owner.

7.3 Review for bias and inappropriate language

AI can reproduce stereotypes or treat similar customers inconsistently. Check whether recommendations rely on relevant facts and whether language is respectful. Do not infer sensitive characteristics from names, writing style, or complaints.

7.4 Maintain transparency where appropriate

Follow organisational policy and applicable requirements on disclosure of AI assistance. Do not falsely claim a human personally investigated an issue if that did not happen. Preserve a human or appeal route where required.

7.5 Keep human oversight for sensitive cases

AI can organise facts and prepare drafts, but it should not replace authorised judgement for high-impact decisions. Define who owns escalation and how the customer will be informed. When reliable information is missing, a safe output may be a list of questions rather than a final answer.

Responsible-use decision gate

Check	Your response
Is the tool approved for this data and task?	☐ Yes ☐ No ☐ Unsure

Have I removed data that is not needed?	☐ Yes ☐ No
Is a current source supplied for policy/product claims?	☐ Yes ☐ No ☐ N/A
Could an error affect rights, money, access, safety, or privacy?	☐ Yes ☐ No
Is the reviewer and escalation route clear?	☐ Yes ☐ No

If the tool is not approved, sensitive data cannot be protected, or required review is unclear, stop and ask the appropriate internal owner.

8. Build Your Team's Shared Prompt Library

A shared library prevents every agent from reinventing instructions and makes effective patterns easier to review. Treat it as a maintained operational resource, not an unowned folder.

8.1 Create reusable templates

Store each prompt's purpose, users, required inputs, approved sources, output format, review requirements, and limitations. Do not embed live customer data in examples.

8.2 Organise by workflow

Category	Example prompt types	Owner / folder
Customer communications	Complaint reply, apology, policy explanation, follow-up	_____
Feedback and insights	Themes, sentiment, recurring issue, trend summary	_____
Case operations	Conversation summary, handover, outstanding actions	_____
Knowledge content	FAQ rewrite, article audit, source check	_____

Journey improvement	Friction analysis, research questions, service ideas	_____
Quality and governance	Output review, privacy check, escalation	_____

8.3 Document successful examples

Store only approved, appropriately anonymised examples. Record why the output was accepted, which tool was used where relevant, and what human edits were needed.

8.4 Assign ownership and review dates

Library field	What to record
Prompt name / ID	Unique title and identifier.
Purpose / users	Task, team, and suitable use cases.
Inputs / sources	Required context and approved policy/product sources.
Tool / configuration	Approved environment and relevant settings.
Owner	Person or role accountable for maintenance.

Review dates	Last reviewed and next review; sooner after source changes.
Limitations	Cases where prompt performs poorly or needs specialist review.
Approval status	Draft, tested, approved, under review, retired.

8.5 Track performance and update templates

Measure usefulness using task-specific indicators, not just whether the result sounds polished. Examples include edit time, material corrections, summary completeness, article defects caught, escalation accuracy, and reviewer acceptance. Establish a baseline and test representative cases before wider use.

Prompt/workflow	Baseline	Pilot result	Reviewer feedback	Decision / review date
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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9. Practical Exercises

Sample data below is fictional. Do not use real customer information in training exercises unless the environment and data use are approved.

Exercise 1 — Rewrite a weak complaint prompt

Scenario: A customer says a subscription renewal charge was unexpected. The team has not confirmed whether a notice was delivered or whether the account qualifies for a refund.

Weak prompt: “Write a nice reply and give them a refund.”

A. Identify three risks in the weak prompt:

B. Rewrite using role, context, task, format, and limits:

C. What must be verified before sending?

Exercise 2 — Summarise a support conversation

Speaker	Fictional message
Customer	I placed an order last Monday. Tracking has shown 'label created' for four days. Has it shipped?
Agent	The order system shows a label, but the carrier has not recorded a collection scan.
Customer	Can you confirm it will arrive tomorrow?
Agent	I cannot confirm that yet. I will ask fulfilment to check dispatch status and update you through the case by the end of the next business day.
Customer	Please make sure I do not have to explain this again.

A. Write a summary with issue, verified facts, action, status, commitment, and next owner:

B. What would be unsafe to add?

C. What must the receiving agent do next?

Exercise 3 — Analyse sample feedback

“Delivery charges appeared only at the last step.”

“The help article fixed my issue in two minutes.”

“I contacted support twice and had to repeat the same details.”

“Return instructions are clear, but I could not find the return label.”

“The app is easy to use; I wish order status updated more often.”

“My issue was solved, but I waited a long time for the first reply.”

A. Group comments into themes and list supporting comment IDs:

B. Which themes repeat and which are single observations?

C. What data is needed before calling an issue widespread?

Exercise 4 — Improve a sample FAQ

Fictional source: “Returns may be requested within 30 days of delivery for eligible items. Items must be unused and in original packaging. Some categories are excluded. After approval, customers receive return instructions. Refund processing time depends on the payment provider.”

Weak FAQ: “Can I return it? Yes, just send it back and you’ll get your money soon.”

A. Identify unsupported or missing details:

B. Draft a clearer answer using only the source:

C. What must the policy owner clarify?

Exercise 5 — Review an AI-generated response

Fictional draft: “We’re sorry your order is late. It will definitely arrive tomorrow, and we have issued a 20% refund.” Supplied facts: the carrier has not confirmed delivery; no refund has been approved; the case is under investigation.

A. Identify each unsupported claim or commitment:

B. Rewrite using only supplied facts:

C. What review/approval is required?

Exercise answer guide

Exercise 1: It assumes eligibility, makes an unauthorised commitment, and omits policy and verified facts.

Exercise 2: State collection is unconfirmed, fulfilment has been asked to investigate, and an update is due by the end of the next business day. Do not promise arrival tomorrow.

Exercise 3: Possible themes include late fee visibility, helpful self-service, repeated information, return-label findability, order-status visibility, and slow first response. The small sample cannot establish prevalence.

Exercise 4: The weak FAQ invents permission to send an item back and promises vague refund timing. Preserve the 30-day window, eligibility, condition, packaging, exclusions, approval, and payment-provider caveat.

Exercise 5: Arrival tomorrow and a 20% refund are unsupported. Explain that delivery status is being checked and give only the approved update commitment.

10. CX Prompt Planning Worksheet

Use this worksheet to design a new prompt before adding it to the shared library.

Field	What to enter	Your notes
CX task	The task AI should help with.	
Desired outcome	What a successful result looks like.	
Context	Relevant customer and business information.	
Prompt	Complete instruction including role, context, task, format, limits.	
Output format	Email, summary, table, list, action plan, etc.	

Constraints	Policies, privacy rules, source requirements, limitations.	_____ _____
Review criteria	How the output will be assessed.	_____ _____
Results and improvements	What worked and what needs refining.	_____ _____

Prompt test record

Test case	Expected output	Observed issue	Change made	Retest result
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

My final prompt

Role:

Context:

Task:

Format:

Limits and quality checks:

AI Prompt Library for Customer Experience Teams | Editable working document

Final Checklist: Before You Use an AI Prompt

- ☐ Is the task clearly defined?
- ☐ Have I provided sufficient, approved context?
- ☐ Have I specified expected format and tone?
- ☐ Have I included relevant limitations and prohibited assumptions?
- ☐ Have I supplied a current source for policy-sensitive claims?
- ☐ Have I protected customer information and used an approved tool?
- ☐ Have I separated verified facts from assumptions?
- ☐ Have I checked for inaccuracies and unsupported commitments?
- ☐ Is the tone empathetic, clear, and respectful?
- ☐ Does the output address the actual concern and give a useful next step?
- ☐ Have I escalated sensitive or high-impact matters appropriately?
- ☐ Have I recorded useful changes so the prompt can be improved or reused?

Team adoption plan

Next step	Owner	Target date	Completion / evidence
Select 3–5 low-risk prompts for a pilot.	_____	_____	_____
Confirm approved tool, data, and review requirements.	_____	_____	_____
Test prompts on representative examples.	_____	_____	_____
Review quality and record failure patterns.	_____	_____	_____
Approve, update, or retire each prompt.	_____	_____	_____
Assign an owner and review date for the library.	_____	_____	_____

Final reminder

The most useful CX prompt is not necessarily the longest. It clearly defines the task, uses reliable context, respects policy and privacy boundaries, and produces an output a person can verify. Start with one repeatable workflow, test variations using approved data, and improve the prompt based on evidence.

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