

# **5 ChatGPT Settings Every Business Professional Should Configure Today**

A Leadership Guide to Productivity, Privacy, and Responsible AI

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## About Chuck Gallagher

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Chuck Gallagher is a Certified Speaking Professional (CSP), business ethics keynote speaker, and AI ethics speaker and author based in Raleigh, NC. He speaks for corporate audiences, associations, and leadership summits — anchoring everything in a "choices and consequences" framework that comes not from theory, but from lived experience. Chuck knows firsthand what it costs to make the wrong call, and more importantly, what it takes to earn back your footing and build something better.

That perspective is what makes his programs land differently than standard ethics or compliance training. He is the author of five books including *Every Choice Has a Consequence* and *Monday Morning Ethics*, and is currently writing *AI Mastery for Managers*. In addition to his speaking work, Chuck serves as a VP at Security National Financial Corp., a public company — giving him current, ground-level perspective on how AI tools and ethical decisions play out inside real organizational structures.

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## Two Executives. Same Technology. Completely Different Results.

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Several months ago I spoke with two executives who had both started using ChatGPT around the same time. Same tool. Same access tier. Same awareness of what AI could do.

The first used ChatGPT the way most people do — open it, ask a question, get an answer, close the tab. Every conversation started from zero. He re-explained his industry, his role, his communication preferences, his audience every single time. Six months in, he described ChatGPT as "interesting." Useful maybe once or twice a week.

The second executive spent twenty minutes — once — configuring the platform before he used it for real work. He built Custom Instructions that captured his role, audience, decision-making framework, and the outputs he needed. He activated Memory. He connected two tools he already relied on. He reviewed his privacy settings. Then he got to work. Six months later, he described ChatGPT as "indispensable."

**The technology was identical. The configuration was not.**

This guide covers five specific settings that separate professionals who get exceptional results from AI from those who don't — and addresses the ethics of AI configuration, because in my experience as a business ethics keynote speaker, the people who get this wrong usually do so from a failure to ask the right questions before they start.

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### 01 **Memory** Build the Closest Thing to an Executive Assistant

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Memory allows ChatGPT to retain information about you across conversations — so you don't spend the first paragraph of every prompt re-introducing yourself.

Think about how you interact with a good executive assistant. You don't explain your job title every morning or re-brief them on key clients. They already know. Memory creates that same dynamic inside ChatGPT, at least for the contextual facts that make responses genuinely useful instead of generically adequate.

#### **What Memory Should Hold**

Store the professional facts that shape how good advice gets given: your industry, role, the audiences you serve, communication style preferences, ongoing projects, and the kinds of outputs you need most often. A useful memory prompt:

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Add this to memory: I lead a mid-sized manufacturing company with roughly 400 employees. My primary communication audiences are the board, plant managers, and external customers. I prefer concise, direct analysis with specific action recommendations. When I ask for strategic input, surface risks I may not be considering – don't just confirm the direction I've already indicated.
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The difference between that prompt and a vague "I'm a business leader" is the difference between a consultant who knows your operation and one who just read your LinkedIn headline.

### What Memory Should Never Hold

Memory is not a filing cabinet for sensitive information. Client confidential data, protected health information, employee performance details, trade secrets, legal strategy — none of it belongs in memory. A practical test: before adding anything, ask whether you'd be comfortable if that information appeared in an audit trail, a data breach notification, or a deposition.

*Just because the system can store something doesn't mean it should. Responsible AI begins with responsible judgment — and that judgment has to come from you.*

## 02 Custom Instructions

The Highest-ROI Setting in ChatGPT

If Memory tells ChatGPT who you are, Custom Instructions tell it how to think with you. This is the single setting that most separates professionals who get genuinely useful AI outputs from those who keep getting polished mediocrity.

Imagine hiring a consultant and refusing to tell them your industry, your goals, your customers, or how you make decisions. The advice would be textbook generic. That's exactly what happens when people use ChatGPT without Custom Instructions.

### Section One: What Should ChatGPT Know About You?

Provide professional context that doesn't change conversation to conversation. Be specific — vague context produces vague outputs.

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I am a healthcare system CFO overseeing a 12-hospital network in the Southeast. My work sits at the intersection of financial performance, regulatory compliance, and operational leadership. I regularly present to the board, interact with clinical leadership, and manage external lender and bond rating relationships. I need analysis that accounts for healthcare-specific regulatory constraints, not just generic financial frameworks.
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### Section Two: How Should ChatGPT Respond?

This section is equally important and more often neglected. It's not enough to tell the system who you are — tell it how to communicate with you, what to prioritize, and what to push back on.

Lead with the answer, then supporting reasoning. No preamble or recap of what I just said. Use concise paragraphs, not bullet lists, unless I specifically request one. When I describe a plan I'm already inclined toward, actively surface risks and counterarguments rather than validating my direction. Include ethical and reputational dimensions when relevant, even if I haven't asked.

### Industry-Specific Starting Points

**CPAs and finance leaders:** Assume a conservative, compliance-first orientation. Flag regulatory gray areas and explain the risk of alternative interpretations before recommending an approach.

**Healthcare executives:** Weight patient privacy, regulatory exposure, and operational throughput heavily. Don't recommend solutions that work in theory but fail in a clinical workflow.

**Association executives:** My audience is professional members, not consumers. Recommendations must account for volunteer governance, member consensus dynamics, and non-dues revenue pressures.

**Operations and construction leaders:** Translate strategy into field-level execution. If a recommendation won't survive contact with a job site or a crew supervisor, flag that explicitly.

## 03 Mobile Integration

### Turning Dead Time Into Thinking Time

I spend a significant amount of time in airports, hotel lobbies, and rental cars. For a long time that time was either lost or spent catching up on email — reactive rather than creative. Mobile AI changed that.

The ChatGPT mobile app supports voice interaction, which turns out to matter more than most people expect. Many executives think differently when speaking versus typing. The friction of typing constrains how much you're willing to explore an idea. Voice removes that friction.

### Applications That Actually Work

**Before a client meeting:** Ten minutes in a rideshare or hotel lobby. Ask for the toughest questions a skeptical executive might raise, the risks in what you're proposing, and what a well-prepared counterpart would already know about your firm.

**After a presentation:** While the room is still fresh — talk through what landed, what didn't, what questions came up. You'll produce a better after-action summary than you'd write sitting down two days later.

**During travel:** Long flights are where I've developed some of my best keynote frameworks. Talking through an emerging idea with an AI configured to push back on weak logic is more productive than staring at a blank document.

**Between back-to-back meetings:** Five minutes in a hallway. "Here's what I just learned — what should I be asking in the next one?"

## 04 Apps & Connectors

### Build an AI Ecosystem, Not an AI Island

AI becomes dramatically more valuable when connected to the tools you already depend on. The goal isn't to add another application to your stack — it's to create a coordination layer that reduces constant

context-switching between systems.

Common integrations that provide real return: document platforms for reviewing reports in context, calendar systems for meeting prep that accounts for what's actually on your agenda, project management tools that surface what's overdue or at risk, and design tools for executives who produce their own visual content.

### The Question to Ask Before Connecting Anything

Before connecting any application, ask: What information will this make accessible to the AI system? What permissions am I granting, and are they broader than necessary? Does this align with my organization's data governance policy? Would I be comfortable explaining this connection to my board, legal counsel, or CISO?

*That last question is a reliable filter. If the explanation would be uncomfortable, the connection probably shouldn't happen — or not yet. Start with one integration, understand what flows where, and validate the return before expanding.*

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## 05 Data Controls

### The Most Important Setting Nobody Talks About

Most executives spend their first weeks with AI thinking about productivity. They spend almost no time thinking about what happens to the data they're feeding into it. That's a governance gap that catches organizations off guard.

Data Controls govern how your conversations are handled — whether they're used to train future models, how long they're retained, who can access shared links, and what your export rights are. These aren't obscure technical settings. They're compliance-relevant decisions that belong alongside your other AI governance policies.

### Review These Settings Before You Go Any Further

**Model improvement:** By default on some plans, your conversations may be used to improve OpenAI's models. If you handle client information, proprietary strategy, or anything an NDA covers, turn this off before your next session.

**Shared links:** ChatGPT lets you generate shareable links to conversations. Understand what you're sharing and with whom before that link leaves your hands.

**Chat history and retention:** Know how long conversations are retained and what your deletion options are — especially if your organization has records management obligations.

**Data export:** Know how to export your data, what format it comes in, and what happens to it if you ever close your account.

Leaders set the tone for how their organizations use AI. If you haven't reviewed your own data controls, you're not well-positioned to ask whether your teams have reviewed theirs. That policy starts with you.

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## The Ethics of AI Configuration

Technology creates possibilities. Ethics determines whether those possibilities should be pursued, and how. In twenty-plus years of speaking on business ethics, I've observed that most organizational failures don't happen because people lack intelligence. They happen because people fail to ask the right questions before

they act — and then move fast enough that the failure compounds before anyone notices.

AI adoption has that same risk profile. The competitive pressure to implement quickly is real, and in that environment the questions that should be asked before deployment tend to get deferred until after something goes wrong.

### Five Questions Worth Slowing Down For

**Transparency:** Would the people affected by an AI-assisted decision understand how it was made if you explained it? Would they find that acceptable?

**Accountability:** When an AI-assisted recommendation turns out to be wrong, who owns that error? The answer has to be a person, not a system.

**Privacy:** What information is entering your AI systems that shouldn't be? Not just what policy prohibits — what would the people whose data it is say if they knew?

**Accuracy:** What's your process for verifying AI outputs before acting on them? "It seemed right" is not a verification process.

**Bias:** AI systems reflect the data they were trained on. Where could that produce outputs that systematically disadvantage certain groups or perspectives?

*Technology should support human judgment. It should never replace it. That distinction matters more as the tools get more capable, not less.*

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## Executive Prompt Library

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Copy, adapt, and save the prompts that fit your workflow. The more specific you make them to your actual role and context, the better the outputs.

### Strategic Planning

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Evaluate this strategic plan from the perspective of a skeptical board member who values financial discipline and has seen similar initiatives fail before. What are the three most serious vulnerabilities?
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### Risk Assessment

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Identify the operational, financial, reputational, and ethical risks associated with this proposal. Rank them by likelihood and potential impact.
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### Leadership Communication

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Rewrite this internal message for a senior executive audience. Preserve the core content, lead with the decision or conclusion, and remove anything that sounds like hedging.
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### Meeting Preparation

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I'm meeting with [describe audience and purpose]. What are the five toughest questions I should anticipate, and what would a strong answer to each look like?
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### Ethics Review

Evaluate this decision through four lenses: legal compliance, alignment with our stated values, reputational exposure, and long-term stakeholder trust. Surface any tensions between these lenses.

### Presentation Review

Review this presentation and identify three places where the argument has gaps, where assumptions are doing too much work, or where a skeptical audience would stop following the logic.

### Competitive Intelligence

What emerging trends in [industry] could disrupt current business models within five years? Separate what's speculative from what's already visible in market data.

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## Your Five-Minute Executive Setup Checklist

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Do these once. The return compounds over every conversation that follows.

- Enable Memory and add a professional context prompt capturing your role, industry, audiences, and output preferences.
- Configure Custom Instructions — both what ChatGPT should know about you and how it should structure responses.
- Review Data Controls, especially model improvement settings if you handle client or proprietary information.
- Connect one business application you already use daily — and review what information it accesses before proceeding.
- Install the mobile app and run one voice interaction to test the workflow.
- Build a short personal prompt library for your five most common use cases.
- Schedule a monthly privacy settings review — these settings change, and your usage evolves.
- Establish basic AI governance guidelines for your team: what's allowed in, what isn't, and who's accountable for outputs.

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For additional resources on business ethics, AI governance, and responsible leadership, visit [ChuckGallagher.com](https://ChuckGallagher.com) or reach out directly to discuss keynote and workshop programs for your organization.