The AI Context Library Template

Build the foundation for 10x AI output.

A fillable framework for structuring the business context that turns generic AI into a strategic advantage.

Chief

Why Context Architecture Changes Everything

The gap between generic AI output and output that actually moves your business isn't the model — it's the **context**. Teams that structure their foundational context before engaging AI tools get dramatically better results across content, operations, and GTM workflows. This template gives you the framework to build that context layer in under 45 minutes. Fill it in once, reference it everywhere.

> ### How to Use This Template
>
> → Work through each section in order. They build on each other.
>
> → Be specific. "Mid-market B2B SaaS" is better than "technology companies."
>
> → Use your customers' actual language, not your internal jargon.
>
> → Keep a completed copy accessible to anyone using AI tools on your team.
>
> → Revisit quarterly. Your context evolves. Your AI context should too.

> **Pro Tip:** The companies getting the most from AI aren't the ones with the best prompts. They're the ones who built the best context layer before they ever opened a chat window.

Business Identity & Positioning

Who you are, what you do, who you serve, how you're different. This is the foundation every AI interaction needs. Without it, you get output built for a company that doesn't exist.

COMPANY NAME

WHAT YOU SELL

Describe your product or service in 1–2 plain sentences. What does a customer actually get?

TARGET CUSTOMER

Who buys this? Include title, company size, industry, and stage.

PRIMARY DIFFERENTIATOR

What makes you genuinely different from alternatives? Not better — different.

POSITIONING STATEMENT

How you'd describe yourself in one breath to a qualified prospect at a conference.

> **Pro Tip:** Test your differentiator by swapping in a competitor's name. If the statement still works, it's not specific enough.

Brand Voice **& Messaging**

How you sound. This is the difference between AI output that sounds like you and output that sounds like everyone else. Define it clearly and every AI interaction inherits your voice.

VOICE ATTRIBUTES (3–5)

Adjectives that define how your brand communicates. e.g., "Direct, data-driven, confident, approachable"

WORDS & PHRASES YOU USE

Signature language your brand leans into.

WORDS & PHRASES YOU NEVER USE

Language that's off-brand or off-limits.

EXAMPLE: ON-BRAND WRITING

Paste or write 1–2 sentences that nail your voice.

EXAMPLE: OFF-BRAND WRITING

Paste or write 1–2 sentences that sound wrong for your brand.

> **Pro Tip:** The "never use" list is often more powerful than the "always use" list. AI tools tend to default to corporate filler — telling them what to avoid is the fastest way to sharpen output.

Target Customer Context

Who you're talking to and what keeps them up at night. AI can't personalize without this.
The more specific you are here, the more relevant every output becomes.

PRIMARY BUYER PERSONA

Title, role, company profile. Who actually signs or champions the deal?

THEIR TOP 3–5 PAIN POINTS (IN THEIR OWN WORDS)

Write these the way your buyer says them in discovery calls, not how your marketing team frames them.

WHAT "SUCCESS" LOOKS LIKE FOR THEM

What outcome are they really buying? What does the after look like?

COMMON OBJECTIONS

The 3–5 reasons qualified prospects hesitate, stall, or say no.

> **Pro Tip:** Pull pain points directly from recorded sales calls or lost-deal surveys. Your customers' actual language is 10x more effective than paraphrased marketing copy.

Content & Messaging Pillars

The 3–5 themes that anchor everything you publish, pitch, or send. Without pillars, AI generates random content. With them, every output is strategically aligned.

PILLAR NAME	ONE-LINE DESCRIPTION	EXAMPLE TOPICS OR ANGLES

Pro Tip: Your pillars should map to your buyer's journey, not your org chart. Each pillar should answer a question your customer is already asking — that's what makes AI output feel relevant instead of self-serving.

QUICK VALIDATION

For each pillar, ask: "Would my best customer immediately recognize this as relevant to their world?" If the answer is no, rethink the framing.

Process & Workflow Context

What "normal" and "good" look like in your operation. This is what turns generic AI into a contextual analyst that understands your business rhythms.

WHAT DOES A HEALTHY SALES CYCLE LOOK LIKE?

From first touch to closed-won. Include typical timeline, number of touches, and key milestones.

TYPICAL DEAL VELOCITY BY STAGE

How long should a deal spend in each stage? What's the expected conversion rate stage to stage?

KEY PIPELINE STAGES & THEIR EXPECTED OUTCOMES

List each stage and what must be true for a deal to advance.

BEHAVIOR PATTERNS THAT SIGNAL RISK OR MOMENTUM

What does a deal going sideways look like? What signals acceleration?

> **Pro Tip:** The more concrete you are here, the more useful AI becomes for pipeline analysis. "Deals that go silent after demo for 7+ days close at 12%" is the kind of context that makes AI output actionable.

Example Outputs & Anti-Patterns

Show the AI what great looks like — and what to avoid. This is the fastest way to calibrate quality. One good example is worth a thousand instructions.

1–2 EXAMPLES OF GREAT OUTPUT FROM YOUR TEAM

Paste real examples: an email that converted, a deck that landed, a report that drove action. What made it great?

1–2 EXAMPLES OF BAD OR GENERIC OUTPUT

What does output that misses the mark look like? Paste an example or describe the patterns.

COMMON AI MISTAKES TO WATCH FOR

What does AI consistently get wrong about your business, market, or customers?

> **Pro Tip:** Build a small "swipe file" of 5–10 great outputs your team has produced. When you start a new AI workflow, drop the most relevant example in as a reference. This single step eliminates 80% of revision cycles.

Data Sources & Systems

Where your information lives. AI is only as good as the context it can access. Mapping your systems helps you understand what data is available to feed into AI workflows — and where the gaps are.

CRM

Platform, what you track in it, data quality (honest assessment).

MARKETING AUTOMATION / TOOLS

Email, content, ABM, etc.

ANALYTICS PLATFORMS

BI tools, dashboards, reporting.

OTHER SYSTEMS HOLDING RELEVANT DATA

Conversation intelligence, product analytics, CS platforms, spreadsheets — anything AI should know about.

KNOWN DATA GAPS

What data do you wish you had but don't currently track or have access to?

Pro Tip: Don't skip the "data quality" honest assessment. AI amplifies whatever you feed it. If your CRM data is 60% accurate, your AI outputs will reflect that. Naming the gap is the first step to closing it.

Want AI That Already Understands Context Architecture?

See how Chief builds this context layer into every insight — so your team spends less time prompting and more time acting on answers that actually move pipeline.

Schedule a Consultation

Chief