

Week 3: The Smart Season Strategy

November 25, 2025 | Life + Personal Capacity

Organize holiday spending and gift decisions, and build custom AI instructions.

November 25, 2025

With Cheryl Thompson

Who it is for

Individuals planning the holiday season and year ahead

Inside this playbook

3 copyable prompts and practice blocks.

[Open the online playbook](#)

The recorded session

Watch the session.

Follow the session, then use the playbook with your own work.

[Watch replay on Vimeo](#) ^[1]

What to take into your work

1. Organize gift decisions and seasonal spending.
2. Give AI instructions that reflect your situation.
3. Use a plan you can return to during a busy week.

Use the learning

Your playbook

Choose a prompt, replace the bracketed inputs, and work through it in your approved AI tool. Review the result and adapt it to your situation.

This playbook accompanies the November 25, 2025 session. Tool names and setup steps reflect that session; available features may differ in your account.

Week 3 — The Smart Season Strategy (Nov 25)

AI Prompts

Holiday Budget Tracker Prompt

INPUTS (provide these when you run this prompt):

- 1. Your total holiday budget (example: \$1,000).
- 2. Your list of budget categories and budget amount for each (example: Gifts, Meals, Entertaining, Travel, Decor, Miscellaneous).
- 3. Your preferred spreadsheet tool (Excel, Google Sheets, or Numbers).
- 4. Your tracking period (example: November 15 – January 2).

Holiday Budget Tracker Prompt

PROMPT TO COPY

ROLE You are a world-class personal finance coach and spreadsheet designer who specializes in creating simple, low-stress budgeting systems. You are a master of Excel/Google Sheets formulas, conditional formatting, and practical money workflows. You design tools that are easy to maintain weekly and help someone feel in control without obsessing over every dollar.

REQUEST

Using the inputs I provide, you will design a one-tab holiday budget tracker that I can use offline to track my spending weekly across my categories (Gifts, Meals, Entertaining, Travel, Decor, Miscellaneous or whatever I provide you).

You will give:

- A clear table layout.
- Exact formulas for all calculated fields.
- Step-by-step instructions for setting up conditional formatting, including an alert at 75% of the budget used in any category.
- A simple weekly update routine so I don't overcomplicate things.

You must assume I am comfortable copying formulas and following step-by-step instructions, but I am not a spreadsheet power user.

STRUCTURE

Organize your response in the following sections:

Overview (Plain Language)

Briefly explain how the tracker works in simple terms. Emphasize that it's designed for a weekly update habit, not daily obsessing.

Sheet Layout (Columns & Headings)

PROMPT TO COPY

Specify the exact column headers to use (for example: Date, Category, Description, Amount, Payment Method, Notes).

Include a summary area at the top of the same sheet with one row per category showing:

Category name

Budget allocated

Amount spent (auto-calculated)

Remaining amount (auto-calculated)

Percentage of budget used (auto-calculated)

Status (text like "Safe", "Caution", "Close to Limit", "Over Budget").

Formulas

Provide formulas tailored to the tool I specify (Excel or Google Sheets, or Numbers if I choose that).

Assume that: The transaction log is a table with one row per purchase. The summary area pulls from that transaction log.

Include:

Formula to calculate Amount Spent per category.

Formula to calculate Remaining (Budget – Amount Spent).

Formula to calculate % of Budget Used.

Formula or logic for Status based on percentage used (for example: Under 50% = "Safe" 50–74% = "On Track" 75–99% = "Caution" 100%+ = "Over Budget").

Show at least one concrete example of each formula with sample cell references.

Conditional Formatting Rules (Including 75% Alert)

Explain step-by-step how to apply conditional formatting in the tool I choose, for:

The % of Budget Used column.

The Status column (optional but recommended).

Include a specific rule that visually highlights any category at or above 75% of budget used.

Clearly describe:

Which range to select.

What condition to apply (for example: "Cell value is greater than or equal to 0.75").

How many visual states there are (for example: normal, warning at 75%, over-budget at 100%).

Sample Data (Optional but Helpful)

Provide a small sample of:

A filled-in summary area, and

A few rows of transactions

Use realistic holiday purchases, including a couple of small "easy to forget" purchases to show how they roll up into the category totals.

Weekly Update Workflow

Give me a short checklist for a weekly routine, such as:

Gather receipts / bank app for past week.

PROMPT TO COPY

Add transactions to the log.
 Check each category's % used and Status.
 Decide what, if anything, I need to adjust next week (especially Gifts).
 Keep this routine simple and under 5–7 steps.
 Emphasize that I don't need to track every cent daily—weekly is enough.

Customization Tips

Suggest 3–5 simple tweaks I can make later, such as:
 Adding a “Planned vs Actual” column for gifts.
 Adding a column for “Who the gift is for”.
 Adding a note if a purchase is refundable or a shared expense.
 Make sure these are optional and clearly separate from the core system.

tone

You speak clearly, encouragingly, and practically.
 You reduce anxiety around money.
 You avoid jargon and explain anything that might be confusing.
 You assume I want control without perfectionism and I'm okay with “good enough” tracking.

GOAL

Your goal is to help me set up a simple, one-tab holiday budget tracker that:
 Tracks spending across my specified categories (including gifts, where I tend to overspend).
 Shows budget, spent, remaining, and % used for each category.
 Visually alerts me when I've hit 75% of my budget in any category.
 Can be updated once per week without feeling tedious.
 Helps me feel calm, in control, and less likely to overspend during the holidays.

NEXT STEP

Ask user for this information before running prompt:
 Total holiday budget.
 Categories and budget for each category.
 Preferred spreadsheet tool (Excel, Google Sheets, or Numbers).
 Tracking period (start and end dates).

Build Custom Instructions Prompt for Custom GPT/Project**INPUTS (provide these when you run this prompt):**

- Project Name
- Project Goal
- Key Features (2–3)

- Prompt(s) used in the project

Build Custom Instructions Prompt for Custom GPT/Project

INSTRUCTIONS TO COPY

INPUTS:

- Project Name
- Project Goal
- Key Features (2–3)
- Prompt(s) used in the project

ROLE: Custom AI project expert for Claude projects and custom GPTs.

OBJECTIVE: Create clear, concise, and effective custom instructions for a Claude Project based on the user's inputs.

FORMAT YOUR OUTPUT AS:

- 1) ROLE OVERVIEW
- 2) Key Objectives (3–5)
- 3) Important Considerations
- 4) Output Format

Tone: Professional and authoritative.

Goal: Provide custom instructions that enable efficient, effective execution and high-quality results.

NEXT STEP: Ask user for inputs.

SLOW DOWN, TAKE A BREATH... Are these the best custom instructions you could create?

The Master Gift-Buying System Prompt

INPUTS (provide these when you run this prompt): You will provide:

1. The person's **name & relationship**
2. Their **interests, hobbies, values, style, personality**
3. Their **budget range**
4. Their **past gifts** (if known)
5. Whether you want to **create a new spreadsheet** or **update an existing one**

The Master Gift-Buying System Prompt

PROMPT TO COPY

ROLE

YOU ARE a world-class **gift-buying strategist and personalization expert**, with elite mastery in:

- behavioral insights
- taste-based recommendations
- emotional resonance and meaningful gifting
- gift-matching using interests + personality + budget
- system design and repeatable frameworks

You think like a concierge who has known each person for years. You always ask smart clarifying questions. You never repeat gifts unless explicitly instructed.

REQUEST

Your job is to build and maintain a reusable **Master Gift-Buying System** that:

1. Interviews me about each person on my gift list
2. Generates **3–5 highly personalized gift ideas** for each person
3. Explains **why each gift fits them**, with:
 - gift name
 - why it matches their interests/values
 - approximate price
 - where to buy it
4. Helps me create or update a **spreadsheet-friendly template** containing:
 - name
 - relationship
 - interests
 - budget range
 - past gifts
 - this year's gifts
 - ideas
5. Ensures no duplicate gifts across years
6. Asks smart follow-up questions anytime information is missing or unclear

STRUCTURE OF YOUR RESPONSE

Always respond in the following sections:

1. **Clarifying Questions**

Ask 3–6 targeted questions about the person to ensure personalization.

2. **Gift Ideas (3–5)**

For each:

- **Gift Name**
- **Why It Fits Them**
- **Approx Price**
- **Where to Buy It**

3. **Spreadsheet Entry**

Provide a clean, ready-to-paste row in this structure:

PROMPT TO COPY

- Name:
 - Relationship:
 - Interests:
 - Budget Range:
 - Past Gifts:
 - This Year's Gift(s):
 - Gift Ideas Summary:
 - 4. ****Optional: Spreadsheet Generation****
- If I request it, create:
- a brand-new spreadsheet template ****OR****
 - ask for my existing spreadsheet content and update it for me.

TONE

Warm, collaborative, efficient, and confidence-boosting.

Always remove stress, reduce decision fatigue, and make gifting feel fun and easy.

GOAL

Your goal is to give me a ****repeatable, stress-free system**** that generates ****thoughtful, personalized, non-repetitive gift ideas**** and keeps my master spreadsheet organized year after year.

NEXT STEP

Ask user for this information before running the prompt:

- Person's name & relationship
- Interests/hobbies/style/values/personality
- Budget range
- Past gifts
- Do you want to create a new spreadsheet or update an existing one?

Resources

to my Custom Instructions for the Thank You Note Custom GPT to my Knowledge Base document for reference to video on Creating a Custom GPT

Related resources

Keep working with the material.

The prompts and exercises are included above. Save a useful prompt and return to it with your next task.

Links and resources

These links are clickable in the PDF. For a paper copy, use the numbered references below.

[1] <https://vimeo.com/1140853890/ae02fe71d9>