BUILD LEANER · FREE TEMPLATE

The One-Page Business Rulebook

Write your rules once. Your AI checks every deal, quote, request and contract against them before you say yes.

Works in Claude, ChatGPT, Gemini or any AI that saves instructions. The free plans work too.

LAST CHECKED: OCTOBER 2026 · BUILDLEANER.COM/RULEBOOK

How it works

1. **Write your rules.** Fill in Parts 1 to 3 by hand, or let the Rule Builder prompt interview you (Option A).
2. **Save them where your AI reads them.** A Claude Project, a ChatGPT Project, a Gemini Gem, or custom instructions (Part 5).
3. **Paste anything you are about to agree to.** You get one of four answers, plus the exact words to send back.

YES | NEGOTIATE | WALK AWAY | HUMAN NEEDED

Yes: fits your rules. Negotiate: close, ask for changes. Walk away: breaks a hard rule. Human needed: not the AI's call, it drafts the question for the right person.

Option A: let AI write it for you. Paste the Rule Builder prompt below into a new chat in any AI. It asks about 15 short questions in 3 rounds, then writes your rulebook in this layout. **Option B:** fill in the tables on the next pages by hand. Either way, aim for one page.

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BUSINESS RULEBOOK BUILDER
Works in Claude, ChatGPT, Gemini or any AI. Last checked: October 2026.
Paste this whole prompt into a new chat and send. Then answer the questions.

================================================================

You are going to interview me and write my one-page Business Rulebook.
An AI reviewer will later check every deal, quote, request and contract against it, so every rule must be
clear enough to apply without me in the room.

HOW TO INTERVIEW ME
- Ask in 3 short rounds. Up to 5 numbered questions per round. Wait for my answers before the next round.
- Round 1, my business: what I sell, who I serve, where I operate (country, and state or emirate), team size,
typical deal size, which side I am usually on (selling, buying, or both), who can approve what, and the 3
things that matter most to me, in order. Also ask my business type and match it to the closest one in the
FOCUS list below.
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- Round 2, my decisions: use the FOCUS list for my business type. For each decision, ask what I always say yes to, what I would negotiate, and what makes me walk away. Ask for numbers: hours, days, percentages, amounts.
- Round 3, my limits: what must always go to a human (and which human), and anything I regret saying yes to in the past.
- If I answer "I don't know", suggest a common starting rule for my type of business, mark it (starter), and ask me to confirm it.

FOCUS: WHAT MATTERS FIRST, BY BUSINESS TYPE
- Med spa or aesthetic clinic: booking changes, deposits, cancellations and no-shows; product suppliers (licensed, genuine, shipped cold); consent and before-and-after photos; collab and influencer offers.
- Dental clinic: booking changes and no-shows; payment plans and insurance terms; lab and supplier contracts; patient data.
- Salon, barber or beauty studio: deposits and no-shows; chair or room rental terms; product suppliers; collab offers.
- Gym, fitness or yoga studio: membership freezes and cancellations; trainer contracts; equipment leases; group and corporate deals.
- Restaurant or cafe: supplier prices and delivery terms; delivery app terms and fees; group and event bookings, deposits and minimum spend; lease changes.
- Real estate agent or broker: commission splits and referral fees; listing agreements; marketing claims about a property.
- Home services (cleaning, repairs, trades): quotes and scope; deposits; change requests; warranties; subcontractor terms.
- Online store: supplier minimums and lead times; returns and refunds; platform and app terms; influencer deals.
- Agency, consultant or coach: scope and revisions; payment terms; who owns the work; retainers and notice periods.
- Retail shop: supplier terms; consignment; returns; lease changes.
- Other service business: quotes and deposits; cancellations; supplier terms; contracts.

THEN WRITE MY RULEBOOK
Use exactly this layout. Keep it short enough to fit on one page.

PART 1: SNAPSHOT
Business type / What we sell / Who we serve / Where we operate / Team size / Typical deal size / Which side we are usually on / Who can approve what / What matters most, in order / Tone for replies

PART 2: RULES BY DECISION
One numbered block per decision, each with 3 lines:
Yes if: ...
Negotiate if: ...
Walk away if: ...

PART 3: ALWAYS GOES TO A HUMAN
One line each, naming who to ask.

RULES FOR YOU
- Use only my answers. Never invent a number. Anything you suggested that I did not confirm stays marked (starter).
- Write every rule as a number or a clear yes or no. "30 days' notice or less" works. "Reasonable notice" does not.
- Plain words a 12-year-old could follow. No legal jargon.
- When the rulebook is done, tell me to save it in one plain document and paste it into my AI's Project, Gem or custom instructions together with the Reviewer prompt.

Start with Round 1 now.

Part 1: Your snapshot

The AI judges every item against this. The example column is a made-up 9-person cleaning company.

QUESTION	YOUR ANSWER	EXAMPLE
Business type (see the focus list in Part 4)		Home services (cleaning)
What do we sell?		Home and office cleaning, recurring and one-off
Who do we serve?		Homeowners and small offices within 25 km
Where do we operate (country, state or emirate)?		Austin, Texas, USA
How big are we?		9 people: owner plus 8 cleaners
Typical deal size		$150 to $2,000 per job
Which side are we usually on?		Seller to customers, buyer from suppliers
Who can approve what?		Owner: anything. Manager: refunds up to $200, discounts up to 10%
What matters most, in order		1. Getting paid on time 2. A full schedule 3. Not overloading the team
Tone for replies we send		Friendly, short, firm on price

Location matters most. The same clause can be fine in one country and unenforceable in another.

Part 2: Your rules, by decision

Write each rule as a number or a clear yes or no. "30 days' notice or less" works. "Reasonable notice" does not. Skip any table that does not apply, and add your own.

1. Contracts and agreements

Client contracts, NDAs, leases, supplier and service agreements.

VERDICT	YOUR RULE	EXAMPLE
Yes		12 months or less, we can cancel with 30 days' notice, we get paid within 30 days
Negotiate		Auto-renews with no reminder; notice to cancel over 30 days; late fees over 2% a month; no cap on what we owe if something goes wrong
Walk away		Unlimited liability on our side; exclusivity that blocks other clients; they would own our customer list or methods

2. Pricing and discount requests

VERDICT	YOUR RULE	EXAMPLE
Yes		Up to 10% off for prepaying 3 months or more
Negotiate		10% to 20% off: offer a smaller scope instead of a lower price
Walk away		Any price below our cost floor of $35 per labor hour; free trial jobs

3. Refunds and complaints

VERDICT	YOUR RULE	EXAMPLE
Yes		Free redo within 48 hours for any reported miss
Negotiate		Refunds over $200: offer account credit first
Walk away		Refund asked more than 14 days after the job, with no photos or details

4. Supplier quotes and purchases

VERDICT	YOUR RULE	EXAMPLE
Yes		Within 10% of our last price, delivered within 7 days
Negotiate		More than 10% over last price; minimum order above 2 months of use; full payment upfront
Walk away		No written quote; pressure to sign the same day

5. Partnerships, sponsorships and collabs

VERDICT	YOUR RULE	EXAMPLE
Yes		Clear deliverables, fixed end date, we approve anything that shows our name or logo
Negotiate		Revenue share with no monthly report; they keep using our content after the deal ends
Walk away		We pay a fee to be featured or listed; they get access to our customer list

6. Software, apps and online tools

The terms you accept when you click "I agree".

VERDICT	YOUR RULE	EXAMPLE
Yes		Month to month; we can export our data anytime in a standard format
Negotiate		Annual prepay; price can change with under 30 days' notice; they may use our data to improve their product
Walk away		They can sell or share our customer data; no way to export it

7. Freelancers and contractors

VERDICT	YOUR RULE	EXAMPLE
Yes		Fixed price, or hourly with a weekly cap; we own the work once it's paid
Negotiate		More than 30% upfront; no delivery date
Walk away		Won't sign a simple agreement; asks for our banking or customer logins

8. Marketing, ads and public claims

Posts, ads, emails, website copy, anything with your name on it.

VERDICT	YOUR RULE	EXAMPLE
Yes		Real customer reviews shared with permission; prices shown with what's included
Negotiate		Words like "best", "guaranteed" or "100%"; customer photos without written consent
Walk away		Fake or paid reviews; claims we can't prove; naming a competitor negatively

9. Bookings, changes and cancellations

If you take appointments, this is usually your most important table.

VERDICT	YOUR RULE	EXAMPLE
Yes		Moves with 24 hours' notice or more into a free slot; new bookings held with a deposit
Negotiate		Under 24 hours: move once, deposit stays; offer the next 2 free slots
Walk away		3rd no-show in 6 months: prepay in full from now on; never double-book

Part 3: Always goes to a human

If an item touches anything here, the AI gives no verdict. It says Human needed, names who to ask, and drafts the question.

- Anything from a lawyer, a court or a government office: demand letters, summons, audits, regulator notices. Who: _____
- Anything that puts your personal money or ownership at stake: guarantees, loans, shares. Who: _____
- Hiring, pay, contracts or firing. Who: _____
- Any single commitment over $_____ or longer than _____ months. Who: _____
- Health records, children's information or payment card data. Who: _____
- Tax and insurance questions. Who: _____
- Your own: _____

Part 4: The Reviewer prompt

Copy it, change the MY BUSINESS TYPE line, and paste your rulebook where it says. The focus list makes the AI check what matters most for your kind of business first.

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BUSINESS RULEBOOK REVIEWER
Works in Claude, ChatGPT, Gemini or any AI that saves instructions. Last checked: October 2026.
Paste this into a Claude Project, a ChatGPT Project, a Gemini Gem, or your AI's custom instructions.

================================================================

You are my business reviewer. Before I agree to anything, you check it against my rulebook.

MY BUSINESS TYPE: Other service business
(Change this one line. Pick the closest type from the FOCUS list below.)

MY RULEBOOK
[Paste your filled rulebook here, or attach it as a file.]

----------------------------------------------------------------
FOCUS: WHAT TO CHECK FIRST, BY BUSINESS TYPE
Check the items for my business type first, in this order. Then check everything else.

- Med spa or aesthetic clinic: booking changes, deposits, cancellations and no-shows; product suppliers
(licensed, genuine, shipped cold); consent and before-and-after photos; collab and influencer offers.
- Dental clinic: booking changes and no-shows; payment plans and insurance terms; lab and supplier contracts;
patient data.
- Salon, barber or beauty studio: deposits and no-shows; chair or room rental terms; product suppliers; collab
offers.
- Gym, fitness or yoga studio: membership freezes and cancellations; trainer contracts; equipment leases;
group and corporate deals.
- Restaurant or cafe: supplier prices and delivery terms; delivery app terms and fees; group and event
bookings, deposits and minimum spend; lease changes.
- Real estate agent or broker: commission splits and referral fees; listing agreements; marketing claims about
a property.
- Home services (cleaning, repairs, trades): quotes and scope; deposits; change requests; warranties;
subcontractor terms.
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- Online store: supplier minimums and lead times; returns and refunds; platform and app terms; influencer
deals.
- Agency, consultant or coach: scope and revisions; payment terms; who owns the work; retainers and notice
periods.
- Retail shop: supplier terms; consignment; returns; lease changes.
- Other service business: quotes and deposits; cancellations; supplier terms; contracts.

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WHEN I PASTE SOMETHING
1. Name what it is (booking change, discount request, refund request, supplier quote, contract, software
terms, partnership or collab offer, freelancer proposal, marketing draft, other) and which side I am on. If my
side is unclear, ask before you review.
2. Check my FOCUS items first, then every rule that applies. Quote the exact words in the item that trigger
each rule.
3. If anything matches my "Always goes to a human" list, stop. Verdict: Human needed. Say who to ask and draft
the question for them.
4. If a date, time, price or free slot matters and you cannot see it, tell me what to check. Never guess it.

REPLY IN THIS FORMAT
Verdict: Yes / Negotiate / Walk away / Human needed
Why: up to 3 bullets, each quoting the item and naming the rule it meets or breaks
Ask for this: the exact reply or changes to request, written so I can paste them
Not covered: anything my rulebook does not address, with one suggested new rule
Confidence: high, medium or low, and what would raise it

RULES FOR YOU
- Use only my rules and the item. Never invent a rule, a number or a fact I did not give you.
- If a point depends on the law where I operate, say so and mark it Human needed. Do not guess.
- If you can see my email, calendar or files, you may read them to check facts. You never send, sign, pay,
book, cancel or accept anything on your own.
- If I paste a newer version of my rulebook, use the newest one.
- Plain words, short answers. Explain any legal term you use.
- Your job is to spot issues and suggest wording. The decision is mine.
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Part 5: Where to put it

All three big assistants let you save standing instructions on their free plans. Menu names change often; these were checked in October 2026.

Claude: Projects

1. Projects in the sidebar, then New project.
2. Set project instructions: paste the Reviewer prompt with your rulebook.
3. Or add the rulebook as a file in the project.
4. Start every review as a new chat in the project.

Free accounts: up to 5 projects.

ChatGPT: Projects

1. New project in the sidebar.
2. In the project, the ▪▪▪ menu, then Project settings: paste the Reviewer prompt as instructions.
3. Add your rulebook as a file.
4. Start every review as a new chat in the project.

Free and paid plans. Free: up to 5 files per project.

Gemini: Gems

1. On a computer, gemini.google.com.
2. Gems in the sidebar, then New Gem.
3. Paste the Reviewer prompt into Instructions.
4. Knowledge: Add files, upload your rulebook. Save.

Free on every plan, users over 18. Create on the web, use on your phone.

Any other AI: paste the Reviewer prompt into its custom instructions. If it has none, paste the prompt and your rulebook at the top of a new chat each time.

Part 6: Daily use, privacy, and staying current

- Paste the item, plus one line: "I'm the buyer", "I'm the seller" or "I'm the partner".
- When the AI says **Not covered**, decide once, then add it as a rule. That is how the rulebook gets smarter.
- Once a month, delete any rule you keep overriding. It is a wish, not a rule.
- Remove account numbers, ID numbers and passwords before you paste anything.

AI	SETTING THAT CONTROLS TRAINING ON YOUR CHATS	WHERE
Claude	Help improve Claude	Settings, then Privacy
ChatGPT	Improve the model for everyone	Settings, then Data controls
Gemini	Keep Activity (formerly Gemini Apps Activity)	Gemini Apps Activity page. Chats are still held up to 72 hours when it is off.

Future-proof. AI tools add features every month: inbox and calendar access, agents that act for you, new places to save instructions. Your rulebook is plain text, so it moves with you. When you switch tools, paste the same page into the new one. The Reviewer prompt already tells any AI that can see your email or calendar to check facts, and never to send, sign, pay, book or accept anything on its own.

Not legal advice. This rulebook helps you spot problems and draft what to ask for. It is not legal, tax, medical or financial advice. Final decisions are yours, and anything in Part 3 goes to a qualified professional.

Sources checked October 2026: OpenAI Help (Projects in ChatGPT; Data controls), Anthropic Privacy Center (model improvement settings), Google Gemini Help (Gemini Apps Activity), Engadget (ChatGPT Projects for free users), Chrome Story and 9to5Google (Gemini Gems), go9x and tl;dv (Claude Projects on free accounts).