

# AI Model Selection Flowchart + Prompt Pack

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## ***What's inside***

- Model Selection Flowchart (GPT-5 • Claude Opus 4.1 • Grok 4)
- Copy-paste Prompts for finance, ops, marketing, education
- Appendix: 10 Paste-Ready Prompts (business workflows)

## ***How to use***

Open the flowchart → pick a model for your task → copy the matching prompt → paste into your tool with your data. Save good outputs as templates.

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## **AI MODEL SELECTION FLOWCHART + PROMPT PACK**

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Choose the right model fast (GPT-5, Claude Opus 4.1, Grok 4) and ship better outputs with copy-paste prompts.

For finance, accounting, taxation, operations, marketing, education, and creators.

How to use this pack:

1. Start with the flowchart to pick the model for your task.
2. Copy a relevant prompt, paste in your tool, and add your data/documents.
3. Save your best outputs as templates for next time.

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## MODEL SELECTION FLOWCHART (TEXT VERSION)

Q1. Does the answer depend on TODAY'S information or news?

- YES → Use Grok 4 (real-time web + tools).
- NO → Go to Q2.

Q2. Is the output sensitive/policy-grade and requires careful, defensible reasoning?

- YES → Use Claude Opus 4.1 (structured, cautious drafts).
- NO → Go to Q3.

Q3. Do you also need an automation/app/script or multi-step workflow?

- YES → Use GPT-5 (build + automate; route simple steps to a lighter tier).
- NO → Draft in Claude Opus 4.1 (for clear structure) or GPT-5 (for faster iteration).

Quality Check (always): Ask a second model to review/critique the draft (red-team).

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## **MODEL PICKER — QUICK CHEAT SHEET**

- Monthly close, reconciliations, ETL, small internal tools → GPT-5
- Policy memos, audit narratives, client advisories → Claude Opus 4.1
- Live updates, news/regulatory monitoring, rapid briefs → Grok 4
- Long document digestion → Claude (cautious) or GPT-5 (fast + automations)
- Brainstorming and many variants quickly → GPT-5
- Web-linked situational awareness before analysis → Grok 4

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## FINANCE & ACCOUNTING — COPY-PASTE PROMPTS

1. Month-End Variance Note (GPT-5)  
“You are my FP&A analyst. Using the attached P&L current vs prior CSVs and the mapping file, list the top 8 variances by amount and %. Attribute likely drivers using the mapping file. Draft a 200-word variance note with 3 recommended actions. Output: markdown table + summary.”
2. GST/Tax Update Explainer (Grok → Claude)  
Step 1 (Grok): “Find today’s credible updates affecting GST input tax credit. Return links + one-line summary per source.”  
Step 2 (Claude): “Using those links, draft a 500-word client explainer with a 4-point ‘What to do now’ checklist. Keep tone clear and practical.”
3. Audit Workpaper Writer (Claude)  
“From these test results, draft: control objective, test steps, exceptions, impact, and management response. Structure into numbered sections; keep under 500 words.”
4. Expense QA (GPT-5 mini)  
“Scan this month’s expense CSV. Flag duplicate receipts, suspicious merchants, and claims outside policy; return a table of anomalies plus short recommendations.”
5. Vendor Terms Radar (GPT-5)  
“Read these contracts. Extract penalties, renewal windows, and price-increase clauses into a table; rank risk high/med/low with one-line rationale.”
6. Board-Ready FP&A Summary (GPT-5)  
“Create a one-page executive summary with charts: revenue, margin, cash. Add 3 bullets on risks & mitigations. Keep to 180–220 words.”
7. Client Advisory Email (Claude)  
“Turn this memo into a 180–220 word client email in plain English with a clear CTA to book a call.”

## **BUSINESS PRODUCTIVITY — MEETINGS, SOPS, EMAIL**

1. Meeting Summary (GPT-5)  
“Summarize these notes into four sections: Decisions, Owners, Deadlines, Risks. Keep under 180 words; return as bullet lists.”
2. SOP Draft (Claude)  
“Create an SOP for vendor onboarding. Format: purpose, scope, roles, steps (numbered), controls (checklist), exceptions.”
3. Email Triage (GPT-5)  
“Classify this inbox into: urgent, important, informational. Draft polite replies for urgent items; propose 3 follow-ups.”

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## MARKETING & CONTENT — REPURPOSE AND PLAN

1. Webinar → Content System (GPT-5)  
“Turn this transcript into: one 1,200-word blog post, three LinkedIn posts, and six short-video hooks. Audience: SMB leaders. Tone: crisp, helpful, specific.”
2. Ad Angle Generator (GPT-5)  
“Give me 7 ad angles and 5 headlines for [product]. Include 3 objections and rebuttals. Keep each headline under 120 characters.”
3. SEO Brief (Claude)  
“Create an outline for a 1,500-word article on [topic]. Include H2/H3s, FAQs, internal link ideas, and a 155-character meta description.”

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## **EDUCATION & GENERAL — STUDY, CAREERS, EVERYDAY**

1. Study Guide Maker (GPT-5)  
“From these chapters, extract key concepts, formulas, 10 flashcards, and 5 MCQs with answers. Keep notes concise.”
2. Resume Bullet Rewrite (Claude)  
“Rewrite these bullets to show impact using metrics and strong verbs. Keep each to one or two lines.”
3. Quiz & Recall (GPT-5)  
“Create a 15-question multiple-choice quiz from this material, with answers and one-line explanations for each.”

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## PROMPT QUALITY — RCCEO FORMULA

R = Role

C = Context

C = Constraints

E = Examples

O = Output format

Template:

“You are my [role]. You have [context]. Do [task] within [constraints]. Use this example for tone/format: [examples]. Return the result as [output format].”

Example:

“You are my FP&A analyst (Role). You have two CSVs and a mapping file (Context). Identify top 8 variances and keep to 200 words (Constraints). See the example note below (Examples). Return a markdown table + summary paragraph (Output).”

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Thanks for reading!

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## AI Prompt Pack — 10 Paste-Ready Prompts (Business Workflows)

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How to use: Copy a prompt, replace items in [brackets], and attach your files or paste short source snippets.

House guardrails to prepend to every prompt: Voice: clear, warm, professional; use contractions; vary sentence length; avoid hype; add 2 micro-stories if relevant. Quality Check: list assumptions, unresolved questions, and a source log (links/quotes).

### 1) Policy Synthesis (Multi-Doc)

Use when: you need a calm, compliant policy from 3–6 sources

Inputs: source snippets or attachments; required sections; audience; owner

Role: Senior policy writer for [Org]. Audience: [Ops/Legal/All staff].

Task: Merge the attached materials into ONE policy with sections: Scope, Roles & Responsibilities, Data Handling, Retention, Approvals, Exceptions.

Include: Definitions table; Do/Don't list; Version log with date/owner.

Voice: calm, precise, professional. Avoid hype or absolutes.

Output: 900–1,200 words with clear headings.

QUALITY CHECK: List assumptions, unresolved questions, and cite source snippets (URL/date/quote). Provide a 7-point compliance checklist.

### 2) SOP Builder (From Bullet Notes)

Use when: you want a repeatable process anyone can follow

Inputs: bullet notes; screenshots if any; SLA; owner/role

Role: Process engineer.

Task: Convert the notes into an SOP with: Purpose, Prerequisites, Step-by-Step, Edge Cases, SLA, Owner & Escalation.

Add: 10-item audit checklist; Failure-mode table (Failure | Impact | Mitigation).

Voice: clear, direct; use numbered steps.

Output: 700–1,000 words.

QUALITY CHECK: Flag any missing inputs or unclear hand-offs and suggest 3 clarifying questions.

### 3) Monthly Finance Narrative (KPI → Story)

Use when: you need a concise, executive-ready narrative

Inputs: KPI table or CSV summary; variance notes; month; audience

Role: CFO brief writer.

Task: Write a 450–600-word narrative that explains performance for [Month].

Structure: Overview → 3 Drivers → 2 Risks → 3 Actions. Suggest 1 chart that best explains the variance.

Tone: even, factual; no hype. Use exact figures.

QUALITY CHECK: List any metric inconsistencies or missing context to verify before publishing.

#### 4) Meeting → Decisions & Tasks + Follow-Up Email

Use when: you want crisp outcomes and next steps after a call

Inputs: transcript/notes; attendees; due-date rules

Role: Chief of staff.

Task: From the transcript/notes, output:

- Decisions (bullet list)
- Action Items (Owner | Task | Due date)
- Risks & Open Questions

Also draft a short follow-up email to attendees with the decisions and next steps.

Tone: neutral, helpful, concise.

QUALITY CHECK: Highlight any ambiguous owners or deadlines.

#### 5) SEO Content Brief (Cluster → Outline)

Use when: you have a keyword cluster and need an on-page plan

Inputs: cluster/export (CSV or list); target reader; product constraints; internal links

Role: SEO strategist.

Task: Build a content brief for the topic “[Primary Keyword]” using the provided cluster.

Include: Search intent; H2/H3 outline; 5 FAQs; internal linking plan; 3 CTAs (Top/Mid/Bottom funnel); notes on E-E-A-T signals to include.

Tone: instructive and human; avoid keyword stuffing.

QUALITY CHECK: List top competitors found and gaps to address.

#### 6) Research Brief with Citations

Use when: you need a quick market scan with receipts

Inputs: topic; timeframe; 5–7 reputable sources (or allow the model to search)

Role: Research analyst.

Task: Produce a 1-page brief on “[Topic]” with 5 dated trends, 3 risks, 3 opportunities.

Include a source table (URL | title | date | 1-line quote). Limit to reputable sources.

QUALITY CHECK: Note weak/contradictory evidence and 3 open questions for follow-up interviews.

#### 7) Product Release Notes + Customer Email

Use when: you’re shipping an update and need clear notes + comms

Inputs: Jira tickets/changelog; audience (admins/end-users); release date

Role: Product marketer.

Task: Write release notes with sections: What’s new, Why it matters, Who is affected, How to enable, Known issues.

Also draft a 120-word customer email (plain, helpful) with a CTA to docs.

Tone: friendly, precise; avoid jargon.

QUALITY CHECK: List potential confusion points and required screenshots/gifs.

### **8) Ad Concepts + 15-Second Video Briefs (Runway/Luma)**

Use when: you want quick concepting for ads or explainers

Inputs: product value props; audience; brand tone; aspect ratio; examples

Role: Creative strategist.

Task: Generate 3 ad concepts (Hook, Proof, CTA), then write two 12–15s video briefs ready for Runway/Luma.

Brief format: Visual beats per 3–4 seconds, on-screen text, music/mood, end-card.

Tone: specific, visual; avoid generic superlatives.

QUALITY CHECK: Flag any claims that need legal review or substantiation.

### **9) Risk Register + Mitigation Plan**

Use when: you need to surface and organize project risks

Inputs: project scope; constraints; deadlines; team roles

Role: Program manager.

Task: Create a risk register (Risk | Likelihood | Impact | Owner | Mitigation | Trigger).

Add a heat-map summary (textual) and 5 immediate mitigations.

Tone: calm, realistic.

QUALITY CHECK: Identify 3 unknowns that drive the most uncertainty and suggest how to test them this week.

### **10) Sales/Lifecycle 3-Email Sequence**

Use when: you want a short sequence that respects the reader's time

Inputs: persona; pain points; offer; success stories; unsubscribe preference

Role: Lifecycle marketer.

Task: Draft a 3-email sequence:

- Email 1: problem + quick win; 120–150 words; 1 CTA
- Email 2: proof (mini-case, numbers); 120–150 words; 1 CTA
- Email 3: options (self-serve, call, or guide); 100–130 words; 1 CTA

Tone: human, low-pressure, useful.

QUALITY CHECK: Ensure claims are sourced; include one-click opt-out line.