The AI Delegation Cheat Sheet

Five copy-ready prompts for real work, the human review point for each, and a loop template that turns corrections into saved instructions.

Paste these common rules first, then one prompt, then attach the inputs.

Use only a company-approved tool and permitted data. List missing inputs; cite each finding; label assumptions; say 'I can't find that' instead of guessing; show formulas. Work in copies and create the requested draft files. Don't change source systems or send, sign, pay, post or approve anything. End with questions for human review. Try a known past example first.

1. Delivery check: what's been delivered, and what hasn't?

Inputs: Ticket or project-board export; commit or release notes; the team's updates and emails; QA or test report; the acceptance criteria you agreed.

Trace every work item in [scope or milestone] through the tickets, release records, team updates and test report. Return a table: item | status claimed | evidence found, with source | live where the customer will use it? | gaps or contradictions | what the team still needs from me (decision, test data, acceptance criteria) | next step.
Treat "code complete" and "ready for a customer" as different statuses. Flag any item marked Done whose own notes list checks that haven't happened. Then draft a short "done means" list for each open item so we can agree on it before more work starts.

Human review: Walk through the table with the team as a shared starting point, not a verdict. Confirm any gap with its owner before anyone calls it late.

2. Contract or renewal comparison

Inputs: The signed agreement and every amendment; the new document; prior order forms; your notes from the sales call; recent invoices.

Compare the new document with the signed agreement and prior orders. Return: item | signed version, with section | new version, with section | what changed | money or date impact | question for the supplier.
Check specifically: renewal and notice deadlines, including time zone; dates and signatories; how any "credit" or discount is calculated; every clause in the new document you can't find in the signed one; and anything in the old agreement or orders that the new document doesn't cancel or replace, such as a support charge that could restart.
If my notes disagree with the documents, list the conflict instead of choosing a side.

Human review: Read every flagged section in the original yourself. This is a comparison to prepare questions, not legal advice. Route material terms to legal or procurement before anything is signed.

3. Spreadsheet reconciliation and customer-demo check

Inputs: The file to check; the source export or system records; how each total is defined; the screens or reports the customer will see.

Validate this file against the source records and add a tab that shows your work: each source row, the matching row in the file, the difference, and the formula used. Flag unit, currency, decimal and transcription errors (for example, 842.17 that became 842,170). Reconcile totals by month and category, and list every difference you can't explain.
Then list every screen, report, field and scorecard the customer will actually look at. Confirm each one is populated and correct, not just that the totals tie. Report anything blank, defaulted or still a placeholder.

Human review: Spot-check a sample of rows yourself. Before the meeting, walk the exact path the customer will see, on the account you'll be using.

4. Meeting prep, then an independent grade

Inputs: Notes from prior meetings; public information your company policy allows you to use; your own scoring rubric; the transcript, recorded only with everyone's permission.

PREP: Summarize what we've discussed before, what they said they need, open commitments on both sides, and relevant public news. Mark which points come from my notes and which from public sources. Suggest three questions and one clear ask.
GRADE (run in a new chat or a different model): Grade this meeting against my rubric, not against any plan written before the meeting. Quote the transcript for every deduction. Separately, assess whether the meeting reached its goal, such as an agreed next step. If the plan was the problem, say so.

Human review: Check every deduction against the transcript. When the grade is wrong, fix the rubric, not just the score. Don't let whoever wrote the plan be the only one grading it.

5. Vendor pricing: what did the supplier say, and what are you assuming?

Inputs: The quote and rate card; your volumes and contract term; supplier emails or clarifications; your requirements.

Break the quote into every price line and tier. Return: line | unit and billing period | what the supplier stated, with source | what you're assuming | cost per unit at our volume | total for the term.
Keep annual and monthly charges separate. Calculate cost per unit as dollars divided by units, and show the formula. Flag minimums, overage rates, auto-renewal, price increases and anything not priced. End with the questions the supplier must answer in writing before we compare options.

Human review: Recalculate two of the numbers yourself. Get the supplier to confirm every assumption in writing before it goes into a business case.

Reusable loop template

Fill this in, save it in your approved tool, and run it by its trigger phrase.

Loop name and trigger phrase Trigger phrase: _____	**Purpose** Deliverable and reader: _____
Inputs Files, systems, locations: _____	**Permissions** Read: ___ Draft: ___ Human only: ___
Steps Number the steps: _____	**Expected output** Format and columns: _____
Source and assumption checks Sources, assumptions, missing evidence: ___	**Acceptance criteria** What proves it is done: _____
Human review point Reviewer and checkpoint: _____	**Corrections log** Date, error, new rule, retest result: ___

Saving corrections

When it gets something wrong, fix the loop, not just the answer. Write the correction as one plain rule, add it to the saved loop, rerun the same example, and log whether the rule worked. **Example rules:** "Keep annual and monthly charges separate."; "Missing evidence is unresolved, not a three."; "A roadmap feature is not a capability available at go-live."

These prompts help you find questions and gaps. They don't replace legal, financial, security or other professional review, and no prompt guarantees accurate output. Check the work against the source before you rely on it.