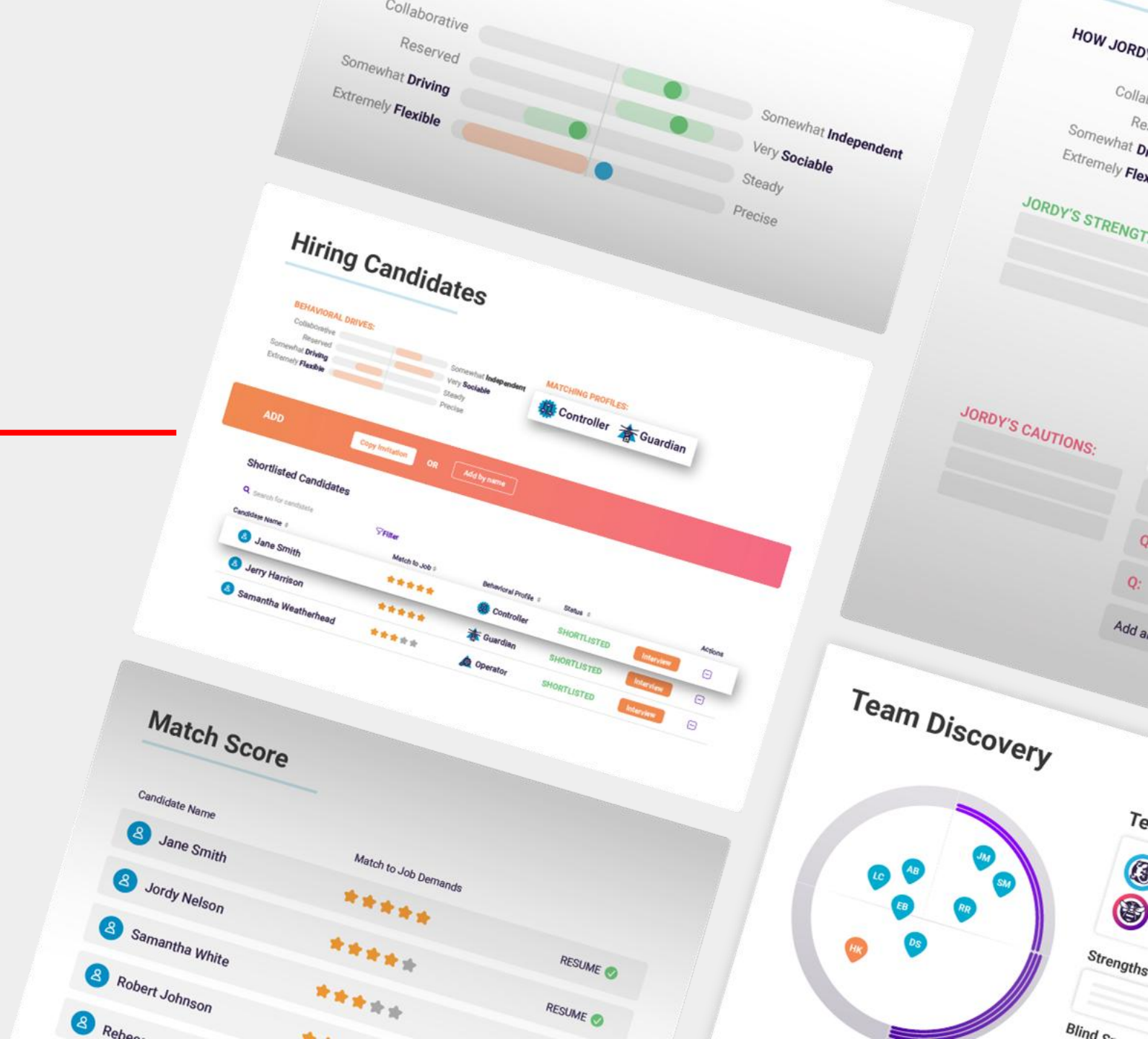


Obi

BY THE PREDICTIVE INDEX

Prompting Best Practices & Frameworks

 **pi midlantic**
TALENT IS EVERYTHING



Dos and Don'ts of Effective Obi/AI Prompts

- | | |
|---|---|
| ✓ Be specific about the situation and what you want | ✗ Ask broad, vague questions |
| ✓ Provide relevant context – don't make AI guess | ✗ Assume Obi knows information you haven't provided |
| ✓ Use a framework to structure complex prompts | ✗ Worry about writing the “perfect” prompt |
| ✓ Be iterative – ask follow-ups, refine, challenge the response | ✗ Take the first response as the final answer |
| ✓ Ask Obi to ask you questions when more information would help | ✗ Try to cram everything into one giant prompt |

Give Obi a Head Start

Settings

Your settings

Organization settings

Help Obi understand your unique organization profile by providing us with details on your industry and company goals.

All users can view these settings. Only Organization Admins can edit this information, but doing so will influence the assistant for everyone.

Company Website

Information is only pulled from the 1 page that you link to. We suggest linking to an "About Us" page that provides details about your company and/or its cultural values.

https://www.example.com

Context

Enter context about your organization such as company values, goals, and industry information.

0 / 2000

File uploads

Upload up to 3 files (either .pdf, .txt or .docx) that provide additional context about your company. Potential examples include company goals, values, and processes. Individual files cannot exceed 3 MB.

From Obi settings, add organizational info

Obi Beta

Hello! What would you like to discuss today

From the chat box, tag people, jobs, and teams or groups using @

What do I do if my team type and strategy don't align?

Upload resumes, notes, performance data, etc.

Show more

@ Mention someone

@ Mention a job

@ Mention a team

@ Mention a survey

@ Mention a group

Upload a file

ates, jobs, teams, surveys and groups.

Hiring Center

Account Executive - Inbound Sales

Folder: --

Job Target

Job Details

Candidates

Job Details

Assessment settings

Job details

Tools

Job ad builder

Job Title *

Account Executive - Inbound Sales

Job Description

Role Overview

An Inbound Sales Account Executive focuses primarily on leads that contact the company actively, through website forms, demos, or inquiries, while converting that interest into revenue.

Key Responsibilities

Manage Inbound Leads: Respond quickly to incoming product requests, demo inquiries, and inbound prospect communications.

Run the Sales Cycle: Handle the full sales process from initial discovery calls and software demonstrations to negotiation and closing.

Cancel

Save changes

Obi can pull from the Job Description

The 4Cs Prompt Framework

Context

Give Obi the background it needs to understand the situation.
What is happening? What information matters?

Characters

Tell Obi who is involved – and connect the relevant people using @.
Who are we talking about? Who will use this response?

Challenge

Clearly explain the problem, question, or situation you want help with.
What are you trying to solve, understand, or prepare for?

Conclusion

Tell Obi what you want back and how you want to use it.
What is the desired outcome? What should Obi produce?

Other Prompting Frameworks

PACE

People 

@Tag the person to pull in their data.

Action 

What do you want to do?

Context 

The more you share, the better.

Exchange 

Have Obi ask you questions to understand.

CRIT

Context 

Provide relevant background info.

Role 

What expertise or perspective do you need?

Interview 

Offer to answer clarifying questions.

Task 

Define the output.

Example Prompt – Selection

Poor Prompting

“I’m interviewing @Natalie for our Account Executive role. What questions should I ask her?”

- Context** ⚠ Little to none
- Characters** ⚠ Natalie, but no Job Target
- Challenge** ⚠ Generic
- Conclusion** ⚠ Vague

Strong Prompting

“I’m interviewing @Natalie for our @Account Executive – Inbound Sales role. I’ve attached her resume so you can consider her experience and work history.

Using her behavioral profile, resume, Job Target, and job description, identify the areas I should explore most deeply in the interview. Create 5 behavioral interview questions specific to Natalie. For each, tell me what I should listen for and why it matters for success in this role.”

- Context** ✓ Job description + resume + behavioral data
- Characters** ✓ @Employee + @Job
- Challenge** ✓ Identify what needs deeper exploration
- Conclusion** ✓ 5 questions + what to listen for + why

Example Prompt – Coaching

Poor Prompting

“@Andrea has the lowest outreach volume on the team. How should I coach her to increase her activity?”

Context ⚠ Limited

Characters ⚠ Andrea only

Challenge ⚠ Surface level

Conclusion ✗ Undefined

Strong Prompting

“@Andrea, who is a @Business Development Representative, has the lowest outreach volume on the team but the highest conversion rate. She spends significant time researching each account before reaching out. Help Andrea’s manager @Evelyn with coaching her to increase her outreach volume without sacrificing the quality and conversion rate that make her successful.

Give me specific coaching questions and recommendations Evelyn can use with Andrea. Ask me any questions that would help you better understand the situation. Additionally, given Andrea’s and Evelyn’s profiles, where might there be natural challenges in coaching her?”

Context ✓ Strong and relevant

Characters ✓ @Employee + @Manager + @Job

Challenge ✓ Specific and nuanced

Conclusion ✓ Clear and actionable