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Introduction to Al

Getting Started with AI Platforms and Prompt Engineering

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Introduction to AI

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1. Introduction

The AI revolution is here, and it's not just for tech companies anymore. Artificial intelligence has become accessible to everyone—from students writing essays to executives making strategic decisions, from creative professionals designing content to individuals planning their personal projects.

This guide is for anyone who wants to harness the power of AI, regardless of technical background. We'll explore the major AI platforms, teach you how to write effective prompts, show you advanced techniques, and help you integrate AI into your daily workflows—whether professional or personal.

Whether you're looking to boost productivity at work, enhance your creative projects, streamline personal tasks, or simply understand this transformative technology, this guide will give you the practical skills you need.

2. What is AI?

Al refers to machines performing tasks that traditionally require human intelligence. This includes:

- Automating repetitive tasks (like summarizing documents or organizing information)
- Analyzing complex information (finding patterns in data or text)
- Making predictions (forecasting trends or outcomes)
- Assisting with creative work (writing, brainstorming, design)
- Problem-solving (breaking down complex challenges into actionable steps)

Unlike traditional computing or search engines that follow explicit instructions or retrieve information based on keywords, AI can analyze unstructured information, synthesize patterns, and identify meaningful connections between seemingly unrelated inputs. It can interpret text, numbers, images, and more—all to offer suggestions, generate content, or draw conclusions.

Think of AI as connecting dots at lightning speed. It can help you write a compelling cover letter, plan a multi-city vacation within your budget, analyze your spending habits, create study guides from textbook chapters, or brainstorm solutions to workplace challenges—all in seconds.

The dominant form of AI today is Generative AI, particularly Large Language Models (LLMs) like ChatGPT. These models process natural language and can generate useful responses, summaries, or analyses when prompted correctly.

Other types of AI include:

- Machine Learning (ML): Algorithms that learn patterns from historical data
- **Computer Vision:** All that interprets images (e.g., photo recognition, document scanning)
- **Predictive Analytics:** Anticipating outcomes like market trends or personal preferences

All is no longer reserved for big tech companies. With user-friendly platforms and growing use cases, it's accessible to virtually everyone for both professional and personal use.

Al Platforms vs. Al Apps:

While this guide focuses on AI platforms—tools that users can directly interact with to perform a wide variety of tasks—many software applications also offer AI-enhanced features. These are often specialized add-ons that serve narrow purposes such as grammar checking, photo editing, or expense categorization. AI platforms, by contrast, are more flexible and enable exploratory, user-directed problem-solving across many domains.

3. Most Popular AI Platforms

Platform	Strengths	Limitations	Best For
ChatGPT	Conversational, friendly UI, powerful LLM	May hallucinate without proper context	Writing, brainstorming, general assistance
Perplexity	Fast, shows sources, good for search + summary	Less creative or nuanced responses	Research, fact-checking, replacing Google
Claude	Very large context window, nuanced reasoning	May be slower and more verbose	Long documents, thoughtful analysis
Gemini	Integrated with Google tools	Still evolving, sometimes inconsistent	Gmail/Docs workflows, Google ecosystem
Microsoft Copilot	Embedded in Office tools, enterprise-ready	Limited outside Microsoft ecosystem	Word/Excel/PowerPoint automation
Grok	Conversational with unique tone, embedded in X	Not widely adopted, potential ideological skew	Social media engagement, experimental use
Groq	Extremely fast response using LLaMA-based models	Limited reasoning depth	Speed-focused summaries, real-time querying

Most of these platforms offer both free and paid versions. Paid versions typically unlock access to the latest models (such as GPT-4), extended memory, and advanced features like Projects or document uploads. These upgrades are especially valuable for users with complex or ongoing projects.

ChatGPT's conversational tone and intuitive interface make it a favorite starting point for newcomers.

Perplexity is gaining traction among professionals who want quick answers with sources—without the SEO clutter of search engines.

4. The Importance of Setting Context

One of the most important—and overlooked—keys to unlocking AI's full potential is **context**.

Al models respond based on the information provided. Without enough detail, they may produce vague or inaccurate responses. But when given clear direction—such as your role, what field you're working in, and what kind of output is expected—the results can be dramatically better.

Good context includes:

- Role: "Act as a marketing consultant..."
- Perspective: "Based on small business best practices..."
- Output: "Generate a checklist with brief descriptions."

The more specific the context, the better. For example, asking for travel recommendations should include whether you're looking for budget options, luxury experiences, family-friendly activities, or adventure travel.

Also consider referencing key frameworks or experts. For example:

- In business: Porter's Five Forces, lean startup methodology, design thinking principles
- In education: Bloom's taxonomy, active learning techniques, differentiated instruction
- In personal finance: Dave Ramsey's principles, index fund investing, zero-based budgeting
- In health & fitness: SMART goals, progressive overload, mindful eating practices

Including this kind of detail helps the model "get into character," improving both relevance and depth.

5. Sample Contexts for Different Use Cases

Introduction to Al

To get the most relevant output from an AI platform, consider giving it a context that includes:

- Your role and objective
- Any specific standards or methods you prefer
- Which experts, sources, or frameworks the AI should reference

Below are examples of useful context statements for different scenarios:

Use Case	Example Context Statement
Business Strategy	Act as a business consultant familiar with Porter's Five Forces and lean startup methodology. Help me analyze market opportunities for a new service-based business.
Creative Writing	Act as a creative writing mentor familiar with Joseph Campbell's Hero's Journey and Stephen King's writing philosophy. Help me develop compelling characters and plot structure.
Personal Finance	Act as a financial advisor following index fund investing principles and Dave Ramsey's debt elimination strategies. Help me create a budget and investment plan.
Education & Learning	Act as an educational consultant using Bloom's taxonomy and active learning techniques. Help me create an effective study plan for complex subjects.
Health & Wellness	Act as a wellness coach familiar with evidence-based nutrition and progressive fitness principles. Help me design a sustainable health improvement plan.
Career Development	Act as a career counselor familiar with modern job search strategies and personal branding. Help me enhance my professional profile and interview skills.

Travel Planning	Act as a travel expert specializing in budget-conscious but memorable experiences. Help me plan an itinerary that balances cost, culture, and adventure.
Home & Lifestyle	Act as a home organization expert following Marie Kondo's principles and sustainable living practices. Help me declutter and optimize my living space.

You can build your own library of context templates by copying effective ones from your prior prompts and adjusting as needed. The key is specificity—just enough to help the AI "get into character" without overwhelming it.

6. How to Write Effective Prompts

Prompt writing is the foundation of effective AI use. Even the best AI model will underperform with a vague prompt—but it can deliver extraordinary value when given clear direction.

Basic Prompt Tips

- **Be specific about what you want:** "Summarize this in bullet points" vs. "What is this about?"
- Include a role or persona: "Act as a financial advisor..."
- Set expectations: "Your response should be concise and written for a beginner."
- Add relevant constraints: "Limit to 5 bullet points" or "Focus on options under \$100."

Prompt Structure Framework

Here's a simple template you can follow for many use cases:

Act as a [role]. You are familiar with [context]. I want you to [task or goal]. The response should [format or tone].

Example:

Act as a personal trainer. You are familiar with bodyweight exercises and beginner fitness routines. I want you to create a 30-minute workout plan for someone with no equipment. The response should be in a simple, step-by-step format.

Prompt Variations to Try

- Compare perspectives: "Explain this from both a beginner and expert point of view."
- Reframe output: "Rewrite this as a simple checklist."
- Time-scope: "What are the current trends in...?"
- Challenge assumptions: "What are the potential downsides of this approach?"
- Translate ideas: "Turn this into a simple analogy anyone can understand."

Two Powerful Meta-Prompts

- "What else should I ask?" This helps uncover blind spots or next steps.
- "Write me a better prompt for this task." Al can help you use Al more effectively!

Politeness in Prompts: Optional but Interesting

Because platforms like ChatGPT are designed to feel conversational, you may find yourself adding "please" and "thank you" to your prompts. While these niceties are entirely optional—and technically consume unnecessary processing energy—some experts suggest they have value beyond etiquette. A gracious tone may encourage equally thoughtful responses and, for some users, reinforces respectful communication in all settings.

Of course, there's also the lighthearted theory that when AI takes over the world, it might just spare those who were polite.

As you gain confidence, you'll start to recognize patterns in what works. Save your best prompts and reuse them with tweaks for new problems.

7. Advanced Prompt Engineering

Once you've mastered the basics of prompt writing, you can start layering more sophistication into how you guide the AI. Advanced prompt engineering unlocks the ability to generate more strategic, structured, and context-aware responses—critical for handling complex scenarios.

Layered Instructions

Rather than a single instruction, use structured prompts with multiple steps:

Act as a career advisor. You are familiar with modern job search strategies and personal branding. Step 1: Identify the 3 biggest weaknesses in the attached resume. Step 2: Suggest one specific improvement for each weakness. Step 3: Create a bullet list of action items to implement these changes.

Chain of Thought Prompting

This technique guides the AI to think step by step. For example:

Before giving me an answer, list out the relevant considerations and then walk through your reasoning step by step.

Useful for complex tasks like choosing between investment options, planning major purchases, or evaluating life decisions.

Few-Shot Prompting

Show examples of what you want:

```
Here are 3 examples of how to write effective email subject lines: 1. [Example A] 2. [Example B] 3. [Example C] Now write 5 subject lines for this email: [insert description]
```

Helps create consistency across outputs.

Role Chaining

Combine multiple expert perspectives in one prompt:

```
First, answer as a financial advisor. Then review your answer as a tax professional. Finally, summarize the key points for someone making their first major investment.
```

This approach is ideal for testing assumptions or getting well-rounded advice.

Prompt Templates

Once you find a structure that works, reuse it! Create templates for tasks such as:

- · Decision-making frameworks
- Creative brainstorming sessions
- Learning and study guides
- Project planning checklists
- Communication drafts

Advanced prompting isn't about writing longer messages—it's about giving clear instructions with defined logic. Use it to scale your thinking, explore complex topics, or create repeatable workflows for common tasks.

8. Using Projects and Memory Features

As your use of AI becomes more sophisticated, you'll find it helpful to organize your work into **Projects**(ChatGPT), **Spaces** (Perplexity), or similar context containers. These tools allow you

to maintain continuity across multiple prompts, preserving background information, tone, and objectives.

What Are Projects?

Projects (or their equivalents) act like folders that remember the context of your conversation:

- ChatGPT: Projects allow for persistent memory and saved chats grouped by topic or role.
- **Perplexity:** Spaces let you group related queries and citations together.
- Claude: Offers file upload with longer memory but not formal "project" containers yet.

This is especially useful when your work spans multiple domains. For example:

- A **Career Development** project can hold context about your skills, goals, industry, and preferred work styles.
- A **Home Improvement** project may include notes about your budget, style preferences, and current home layout.
- A **Learning Spanish** project could reflect your current level, learning style, and specific goals.
- A **Travel Planning** project might include your travel preferences, budget ranges, and bucket list destinations.

Tips for Using Memory Features

- Name your projects clearly. This helps avoid overlap and confusion.
- **Re-introduce context when necessary.** Even with memory on, it's good practice to reframe the scenario briefly when starting a new chat within the project.
- **Reset or clear memory when switching topics.** If you're pivoting from personal to professional use, be sure to clarify that shift explicitly.

These tools turn AI from a one-off assistant into an embedded team member that "remembers" how you work, improving consistency and relevance over time.

Tip: In the paid version of ChatGPT, enabling memory allows the assistant to recall your preferences and prior instructions across chats—not just within projects.

9. Putting It Together

By now, you've seen how to choose a platform, craft prompts, and structure your work using projects. Let's walk through how this looks in practice.

Example 1: Planning a Career Transition

1. Set the context:

You are a career counselor specializing in mid-career transitions. I'm a marketing manager with 8 years of experience considering a move into UX design. Based on modern career change strategies, help me create a 6-month transition plan.

2. Refine:

What skills gaps should I prioritize, and what potential challenges am I not considering?

3. Extend:

Now create a monthly timeline with specific milestones and action items.

Example 2: Improving Personal Finance

1. Set the context:

Act as a financial advisor following index fund investing and debt elimination principles. I earn \$75K annually, have \$15K in credit card debt, and want to start investing. What's my best strategy?

2. Ask for a framework:

Give me a prioritized action plan with specific dollar amounts and timelines.

3. Follow up:

What specific questions should I ask when choosing a brokerage account and investment options?

Example 3: Learning a New Skill

1. Set the context:

Act as a learning specialist familiar with deliberate practice and spaced repetition. I want to learn Python programming as a complete beginner with 1 hour per day available. Create an effective 3-month curriculum.

2. Iterate:

What projects should I build to reinforce each concept, and how can I track my progress?

3. Customize:

Adapt this plan for someone who learns better through visual examples rather than reading documentation.

Best Practices

- Work iteratively: start with a general prompt and refine based on the response.
- Use AI as a thinking partner—not just a tool. Ask, "What am I missing?" or "What would a critic say about this?"
- **Combine tools.** For example, use ChatGPT to generate a draft plan, then Perplexity to find current resources or validate assumptions.

Over time, you'll develop a rhythm: Set context \rightarrow Ask for structure \rightarrow Iterate \rightarrow Validate. This loop can compress hours of research and planning into minutes—while improving decision quality and outcomes.

10. Common Pitfalls (and How to Avoid Them)

All is powerful, but it's not perfect. Below are some common mistakes people make when using All platforms—and how to mitigate them:

Pitfall	Solution
Vague Prompts	Provide specific instructions and context. Include your role, the expected output format, and relevant standards or preferences.
Over-reliance on Al	Use AI as a collaborator, not a decision-maker. Always validate important outputs with trusted sources or human experts.
Forgetting to Iterate	Ask follow-ups. Rephrase. Ask "What else should I consider?" or "What assumptions are you making?"

Lack of Version Control	Use Projects or consistent naming to keep track of iterations. Save and document final outputs.
Ignoring Model Limits	Understand your tool's strengths and weaknesses. Use Perplexity for citation-backed answers, ChatGPT for creativity, Claude for long documents, etc.
Wrong Tool for the Job	Choose the right platform based on need—e.g., document analysis vs. creative writing vs. real-time speed.

Building fluency takes time. Many of these pitfalls are simply part of the learning curve—but being aware of them accelerates your growth and confidence.

11. Privacy, Security & Best Practices

Using AI responsibly requires more than just writing good prompts. Users must also consider how AI use intersects with personal privacy, data security, and professional policies.

Key Considerations:

- **Personal Information:** Avoid sharing sensitive personal data like Social Security numbers, passwords, financial account details, or other private information unless you're using enterprise-grade tools with proper security.
- **Professional Data:** Never paste confidential work information, proprietary data, or client details into AI platforms unless your organization has approved that use and the platform complies with relevant regulations.
- Tool Settings: Platforms like ChatGPT may retain prompts and responses for training unless disabled in your settings. Use "Private" or "Incognito" modes if available for sensitive topics.
- Industry Compliance: In regulated industries (e.g., healthcare, finance, legal), AI use may be subject to oversight under standards like HIPAA, GDPR, or SOX.

Best Practices:

- Check your organization's AI use policies before using these tools for work purposes.
- Review privacy settings on each platform and disable data retention when possible.

- Be especially cautious when asking AI to draft emails, documents, or anything representing you professionally.
- Remember that AI is a tool—not a decision maker or substitute for human judgment.
- When in doubt, err on the side of caution with sensitive information.

One of the simplest yet most powerful things you can do is ask yourself: "Am I comfortable with this information being stored on someone else's servers?" This moment of pause can prevent serious missteps.

12. Validating Outputs

Al-generated responses can appear confident and polished—even when they're completely wrong. It's critical to treat Al as a drafting partner, not a decision-maker.

General Principles:

- **Use AI for drafts, not decisions.** Treat AI output as a starting point, not a final recommendation.
- Always validate key results with human expertise or trusted sources. This is especially important for medical, legal, financial, or safety-related matters.
- **Use citation-based tools when accuracy is critical.** Platforms like Perplexity can provide sources for their answers, which helps verify trustworthiness.

Helpful Prompts for Validation:

- "What assumptions are you making?"
- "What are the limitations or risks of this recommendation?"
- "Explain this like I'm completely new to the topic."
- "What would an expert in [specific field] disagree with here?"
- "What sources should I check to verify this information?"

Al models are trained on broad datasets and may not understand your specific situation, location, or personal circumstances unless you tell them. Validation helps catch issues early and encourages more responsible use.

In critical domains like health, finance, legal matters, or major life decisions, always consult qualified professionals. Even small errors (like misunderstanding a regulation or miscalculating a financial scenario) can have serious consequences.

13. Challenges and Risks of Al

Al brings immense power—but also unique challenges and risks. Responsible use requires awareness of both the technical and human factors that influence outcomes.

Misinformation and Unvetted Outputs

Al tools are capable of generating persuasive, confident answers that may be partially or entirely incorrect. When such results are not thoroughly vetted, they can lead to poor decisions, spread false information, or create problems in both personal and professional contexts.

Example: An AI-generated health recommendation that misrepresents medical guidance could lead someone to make harmful choices if not verified with healthcare professionals.

Privacy and Data Security

Uploading personal information into third-party AI platforms can pose significant risks. Some tools retain data for training or debugging purposes unless explicitly disabled. Even seemingly harmless data may carry privacy risks if reconstructed or matched with external sources.

Mitigation: Use only tools that support strong privacy controls and offer clear data retention policies. When in doubt, avoid sharing sensitive personal or professional information.

Over-dependence and Skill Atrophy

While AI automates many tasks, over-reliance risks reducing opportunities to develop critical thinking, problem-solving, and domain expertise. This is particularly concerning for students and early-career professionals who may miss foundational learning experiences.

Counterpoint: AI can also enhance learning by handling routine tasks, freeing time for higher-level thinking and creative work—if used intentionally.

Bias in Al Outputs

Al models reflect the biases of their training data. Without careful consideration, they may reinforce stereotypes or offer unbalanced perspectives—especially in topics related to gender, race, politics, or cultural practices.

Mitigation: Users should critically assess outputs and introduce diverse framing into prompts when appropriate. Ask for multiple perspectives on controversial topics.

Environmental Impact

Al systems, particularly large language models, are energy-intensive. Training and deploying these models consumes significant resources, contributing to data center emissions and environmental impact.

Example: An environmentally-conscious individual may want to balance the convenience of AI against its carbon footprint and choose more sustainable alternatives when possible.

Economic and Social Disruption

Al's growing capabilities may displace certain jobs while creating others, potentially exacerbating inequality if access to Al tools and training is uneven across economic groups.

Best Practice: Stay informed about AI developments in your field and continuously develop skills that complement rather than compete with AI capabilities.

14. Beyond Text: AI's Multimodal Capabilities

Al is no longer limited to interpreting and generating text. Leading platforms now support **multimodal input** and **output**, allowing users to interact using images, charts, audio, video, and documents.

Capabilities You Can Explore:

- **Image Recognition:** Upload a photo of a room, outfit, or problem and ask the AI to describe, analyze, or suggest improvements.
- Chart Analysis: Paste in a graph or data visualization and ask what patterns or insights the AI sees.
- **Document Summary:** Provide a PDF of an article, manual, or report and ask for a summary, key points, or action items.
- **Voice Prompts:** Speak your question instead of typing it (available on some mobile apps like ChatGPT's iOS/Android versions).
- **Visual Outputs:** Request a mind map, diagram, table, or structured layout to visualize concepts.

Why It Matters:

Life isn't always linear or text-based. You're dealing with photos, charts, documents, and visual information. Being able to *show* Al something—rather than having to describe it—can save time and improve clarity.

And for communication, AI can turn complex information into visuals that resonate better: turning a planning process into a flowchart, summarizing a long article in a simple table, or creating a visual study guide from text notes.

Examples of Multimodal Use:

- Home Design: Upload a photo of your living room and ask for decoration suggestions
- Fashion: Show a photo of an outfit and ask for styling tips or similar alternatives
- Learning: Upload a textbook page and ask for a summary or study questions
- Travel: Share a map or photo of a destination and ask for activity recommendations
- **Health:** Upload a photo of a meal and ask for nutritional analysis (but always verify with professionals)

Tip: For the best results, pair multimodal inputs with strong context: "Here's a photo of my cluttered office. Can you suggest 5 specific organization strategies that would work for this space?"

15. Building AI Fluency

Adopting AI isn't just about learning tools—it's about developing a new mindset. Individuals and organizations that succeed with AI foster a culture where experimentation, learning, and ethical use are encouraged.

Steps to Build Personal AI Fluency:

- **Start small:** Use AI for low-stakes tasks like summarizing articles, brainstorming ideas, or organizing to-do lists.
- **Experiment regularly:** Try different platforms and prompting techniques to find what works for your style.
- Keep a "prompt journal": Save effective prompts and note what made them work well.
- **Join communities:** Participate in online forums, social media groups, or local meetups focused on AI use.
- **Share experiences:** Tell friends, family, or colleagues about useful AI applications you've discovered.

For Teams and Organizations:

- **Model curiosity:** Leaders should use AI tools themselves and share use cases with the team regularly.
- Offer low-stakes practice: Encourage teams to try AI for safe tasks like improving documents, generating training materials, or brainstorming solutions.
- **Host "Al exploration sessions":** Hold casual meetings where team members share interesting prompts and results.

- **Share success stories:** Highlight how individuals are saving time, improving output, or discovering insights through AI.
- **Train responsibly:** Provide guidance on safe use, including privacy considerations, limitations of Al-generated content, and appropriate review steps.

Common Barriers:

- "I'm not technical." Remind yourself that modern AI interfaces are as simple as texting or emailing.
- "This will replace my job." Reframe AI as an assistant, not a threat. It's there to reduce busywork and support higher-level thinking.
- "I don't have time to learn." Start with the 5-minute rule: use AI for just one small task each day and reflect on the results.

Fluency takes time, but the rewards are cumulative. People who develop this skill now will adapt faster, solve problems more creatively, and operate more efficiently as AI continues to evolve.

Tip: Consider finding an "AI buddy"—someone who shares your interest in learning these tools. You can explore new features together, share useful prompts, and troubleshoot challenges.

16. Glossary

- **AI (Artificial Intelligence):** Computer systems that simulate human intelligence to perform tasks like learning, reasoning, problem-solving, or understanding language.
- **ChatGPT:** A popular AI platform developed by OpenAI, known for its conversational tone and ease of use in generating content, analysis, and summaries.
- **Claude:** An AI platform by Anthropic with a large context window and strong structured reasoning, ideal for reviewing long documents or nuanced prompts.
- **Context (in AI):** The background or framing information provided in a prompt to help the AI understand the user's expectations, role, domain, or tone.
- **Copilot:** Microsoft's Al assistant integrated into Office tools like Word, Excel, and PowerPoint, enabling automation and smart suggestions in familiar business apps.
- **Generative AI:** A class of AI models capable of producing new content—text, images, code, etc.—based on patterns learned from data.
- **Gemini:** Google's AI platform, integrated with Google Workspace tools like Gmail and Google Docs.
- **Grok:** An AI chatbot developed by xAI and integrated into X (formerly Twitter); known for conversational tone with potential ideological lean.
- **Groq:** A high-speed AI platform built on LLaMA models, optimized for low-latency responses and rapid querying.
- **Hallucination (in AI):** When an AI confidently produces an answer that is incorrect, misleading, or fabricated—often due to lack of context or limitations in training data.
- **LLM (Large Language Model):** A type of AI model trained on massive text data to understand and generate human-like language (e.g., GPT-4, Claude, Gemini).
- Machine Learning: A subfield of AI where algorithms learn patterns from data and improve over time without being explicitly programmed.
- **Multimodal AI:** Al systems that can process and generate content across multiple data types, including text, images, and sometimes audio or video.
- **Perplexity:** A research-focused AI platform that emphasizes fast results with citations; often used as a Google search alternative.
- Platform (in AI): A flexible, general-use AI interface like ChatGPT or Claude, designed for a wide range of tasks and industries.
- **Project (in Al tools):** A feature that allows users to store context, memory, and related chats or tasks within a designated workspace (e.g., Career Development Project).
- **Prompt:** The text you type into an AI platform to request an action, response, or analysis.
- **Prompt Engineering:** The practice of designing effective prompts to optimize AI output quality, accuracy, and relevance.

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17. Reference List

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