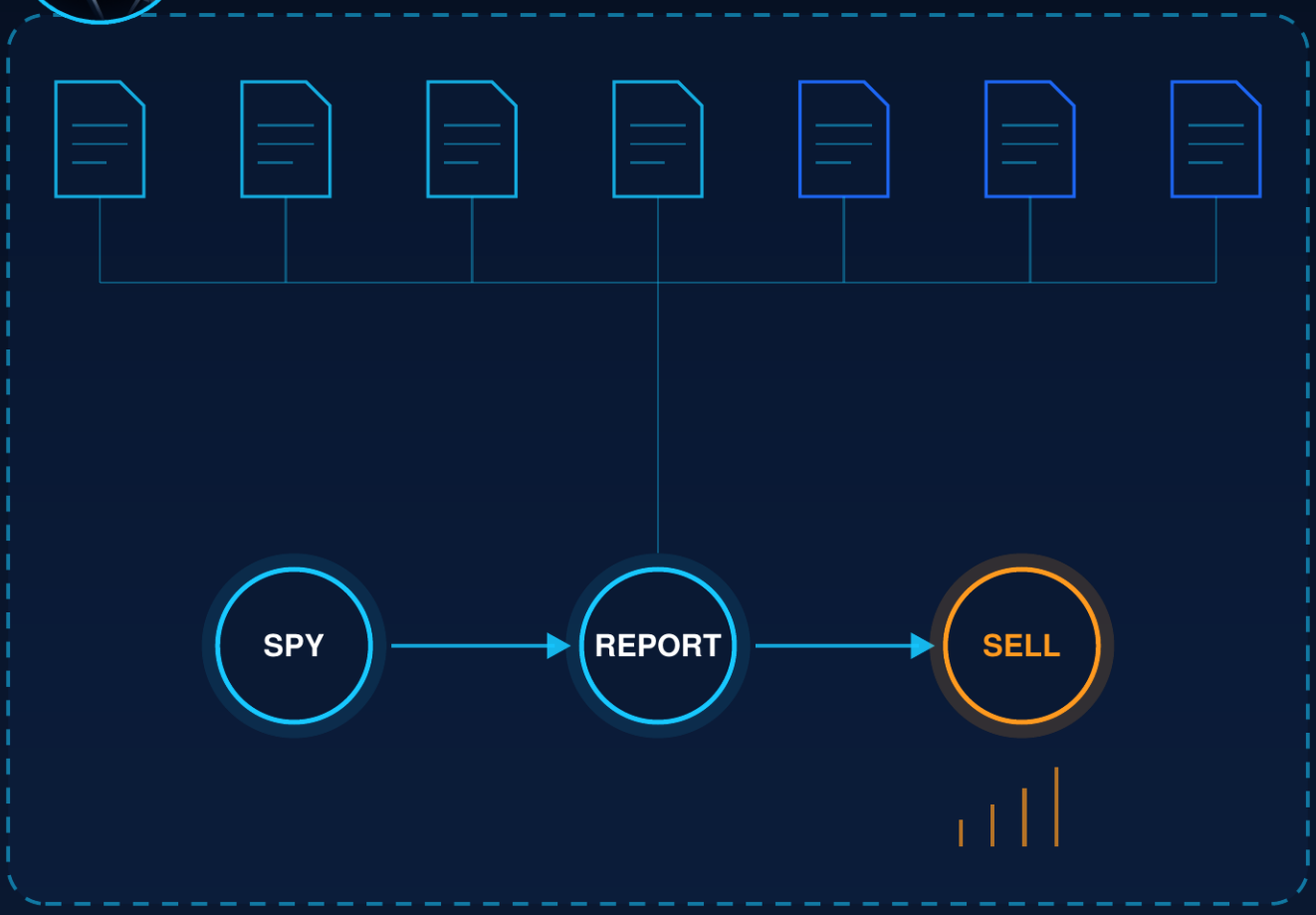
MarketSpy AI



MARKETSPY AI | SETUP GUIDE

Project Builder

Build Your MarketSpy Workspace

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MarketSpy AI Project Builder Setup Guide

Build Your MarketSpy Workspace

MarketSpy works best when you give it its own AI Project.

A Project gives MarketSpy a dedicated workspace where your business information, MarketSpy instructions, prompt libraries, report templates, research, and previous work can stay together.

Once you set it up, you can use the same Project to:

> **SPY → REPORT → SELL**

Each chat session in the project can represent you learning how MarketSpy works, testing the workflows, and teaching the project things about your business goals, as well as your personal strengths, and weaknesses.

The more you use it, the more MarketSpy will learn how best to keep you moving forward.

You primarily use MarketSpy AI to research competitors and markets and then turn the intelligence you find into professional reports that you sell. You also use those findings and reports to create offers, sales messages, outreach, presentations, proposals, and campaigns.

LUTHER'S NOTE: You could operate MarketSpy without a project just by adding all training files into a chat session, but this is a poor method of use and doesn't help you stay organized. It also requires you to do other tasks that the

AI is purposely engineered to do; so why do them? Take five minutes and make yourself a project. These instructions are purposely written to cover everything in detail, but in reality, all you're really doing is dragging the project files into a little box on your AI platform and adding the instructions.

For most case, you only need to build the Project once for general use, and no technical skill is required to do so. You can also create a dedicated MarketSpy Project for specific clients to stay organized for recurring client work.

STEP 1

Setting Up MarketSpy in ChatGPT

Step 1: Create A New Project

Open ChatGPT and create a new Project.

Name it:

> **MarketSpy AI - [Your Company Name]**

Examples:

> **MarketSpy AI - Smith Marketing**
> **MarketSpy AI - ABC Plumbing**
> **MarketSpy AI - Client: Johnson Roofing**

Add a Project description, use:

> **PROJECT DESCRIPTION**
>
> MarketSpy AI is a competitive market research, opportunity discovery, reporting, and sales workspace. It researches competitors and markets, identifies patterns and opportunities, turns findings into useful business intelligence, creates professional reports, and helps convert that intelligence into offers, sales messages, campaigns, content, outreach, and other sales assets.

STEP 2

Step 2: Add the MarketSpy Project Instructions

Open your Project's instructions or custom instructions area.

Open the included file:

> **01-Project-Settings.txt**

Find the section labeled:

> **PROJECT INSTRUCTIONS**

Copy that entire section into your Project instructions.

These instructions tell your AI how MarketSpy operates, including:

> **SPY**
>
> Research competitors, customers, offers, reviews, positioning, marketing, websites, content, local visibility, gaps, and opportunities.

REPORT

Turn the research into useful competitive intelligence and client-ready reports.

SELL

Turn the intelligence into offers, sales messages, outreach, telephone scripts, emails, DMs, content, presentations, proposals, and campaigns.

The instructions also tell the AI to reuse previous Project research instead of repeatedly asking you for information it already has.

STEP 3

Step 3: Add the MarketSpy Operating Guide

Upload:

02-MarketSpy-Operating-Guide.txt

This is the core MarketSpy training file.

It teaches your AI how the entire system works, including the SPY → REPORT → SELL workflow, how MarketSpy prompts work together, how previous research should be reused, how MarketSpy Handoffs work, and how to distinguish facts, claims, inference, and hypotheses.

For example, MarketSpy is specifically instructed to inspect your business profile, previous research, reports, handoffs, sales work, and other Project information before asking you for information again.

This allows research to accumulate instead of forcing you to start from scratch every time.

STEP 4

Step 4: Customize Your Business Profile

Open:

> **03-Your-Business-Profile.txt**

Complete the information that applies to your business.

This gives MarketSpy important context about who you are, what you sell, who you serve, your market, your capabilities, and your goals.

You do not need to complete every field.

Add whatever information you know and leave anything irrelevant or unknown blank.

When finished, upload the completed file to your MarketSpy Project.

This becomes part of MarketSpy's persistent working knowledge.

STEP 5

Step 5: Add the Report Standards

Upload:

> **04-Report-Standards.txt**

This file tells MarketSpy how reports should be written and presented.

It helps keep reports concise, useful to business owners, evidence-driven, commercially relevant, and consistent across different MarketSpy research projects.

STEP 6

Step 6: Upload the Three Prompt Libraries

Upload these files:

> **AI_Spy_Prompts_Library.txt**
> **Report-Prompts_Library.txt**
> **Sales-Prompts_Library.txt**

Together, these contain the complete MarketSpy prompt system.

You do not need to run all of them.

Choose the prompts that fit what you are trying to accomplish.

If you are ever in doubt, just tell MarketSpy what you're trying to do, and it will recommend an easy-to-follow path.

For example:

Market Mapper
↓
Competitor X-Ray
↓
Review Intelligence
↓
Gap Finder
↓
Gap & Opportunity Report
↓
Sales Opportunity Finder
↓
Offer Builder
↓
Outbound Sales Builder

MarketSpy can also recommend which prompt makes sense next based on what it discovers.

The prompts are deliberately interconnected. Spy prompts preserve useful findings for reports, and Report prompts can pass commercially important intelligence into the Sales prompts.

STEP 7

Step 7: Upload the Report Templates

Add the included report templates to the same Project.

These include:

Executive Brief Template

Designed for a short management-level summary containing the bottom line, top findings, recommended actions, and next step.

Competitive Scorecard Template

Designed to compare a client against competitors using a simple 1-to-5 competitive scoring system.

Competitive Report Templates

Use these when you want a more complete client deliverable containing an executive summary, research scope, key findings, competitor comparisons, opportunities, recommendations, and sources.

Several visual styles are included so you can choose the presentation that best fits your business or client.

MarketSpy is also capable of producing new report themes and templates based on your inspiration or design ideas.

Note: the graphic design of reports has been shown to be adequate in ChatGPT, however Claude produces more visually appealing designs.

STEP 8

Step 8: Your MarketSpy Project Is Ready

Your Project should now contain:

> **01-Project-Settings.txt**
> **02-MarketSpy-Operating-Guide.txt**
> **03-Your-Business-Profile.txt**
> **04-Report-Standards.txt**

> **AI_Spy_Prompts_Library.txt**
> **Report-Prompts_Library.txt**
> **Sales-Prompts_Library.txt**

> **Executive-Brief-Template**
> **Competitive-Scorecard-Template**
> **Report Templates**

You now have a persistent MarketSpy workspace.

Setting Up MarketSpy AI in Claude

You can also run MarketSpy AI inside a Claude Project. This gives MarketSpy a dedicated workspace where your instructions, MarketSpy files, business information, research, and ongoing work can stay together.

Step 1: Create a New Project

Open Claude and go to Projects.

Create a new Project and give it a descriptive name.

For example:

> **MarketSpy AI - Smith Marketing**

or

> **MarketSpy AI - Client: Johnson Roofing**

Keeping each business or client in its own Project makes it easier for MarketSpy to maintain the correct context.

Step 2: Add Your MarketSpy Files

Add the MarketSpy files included with your purchase to the Project's knowledge.

These include:

- Project Settings
- MarketSpy Operating Guide
- Your Business Profile
- Report Standards
- AI Spy Prompt Library
- Report Prompt Library
- Sales Prompt Library
- Report templates and supporting files

These files give Claude the MarketSpy framework, prompts, reporting standards, and reference materials it needs to work with the system.

Step 3: Add the MarketSpy Project Instructions

Open the included Project Settings file.

Copy the PROJECT INSTRUCTIONS section into your Claude Project instructions.

These instructions tell Claude how MarketSpy operates, including the core:

> **SPY → REPORT → SELL**

workflow.

They also tell Claude to use existing Project knowledge, preserve useful research, distinguish evidence from inference, and build new MarketSpy work from intelligence already collected.

Step 4: Complete Your Business Profile

Open the included Your Business Profile file and complete as much information as you can.

Include information such as:

- Business name
- Industry or niche
- Location or service area
- Products or services
- Typical customers
- Primary goals
- Known competitors
- Important differentiators

You do not need to know everything.

Complete what you can and leave anything unknown or irrelevant blank. MarketSpy can also help you fill out this profile if you request help.

This gives MarketSpy additional context it can use when researching competitors, identifying opportunities, creating reports, and developing sales materials.

Step 5: Start Using MarketSpy

Your Claude Project is now ready.

Start a new conversation inside the Project and use the MarketSpy prompt appropriate to what you want to accomplish.

For example:

> **Market Mapper**
> Find the competitors that matter.

> **Offer Spy**
> Analyze competitor offers, packages, promotions, guarantees, financing, and other selling approaches.

Gap Finder

Look for opportunities competitors may be overlooking.

Gap & Opportunity Report

Turn your research into a client-ready report.

Sales Opportunity Finder

Turn the intelligence into potential commercial opportunities.

You do not need to run every prompt included with this package! The Project will select the appropriate prompts to use based on your use case.

Keep Your MarketSpy Work in the Project

Whenever possible, continue your MarketSpy research inside the same Claude Project for general work.

As you conduct research and create reports, Claude can use the Project's available context to help subsequent MarketSpy work build on what has already been discovered.

Instead of treating every prompt as a completely separate task, MarketSpy becomes an accumulating competitive intelligence workspace:

Research → Intelligence → Reports → Opportunities → Sales Assets

Using MarketSpy

You don't need to memorize the 43 prompts.

Start with what you want to accomplish.

For example:

> **PROMPT**
> I want to find competitive opportunities for roofing companies in Charlotte.

Or:

> **PROMPT**
> I want to analyze the five strongest competitors for this restaurant.

Or:

> **PROMPT**
> I want to create a competitive report I can sell to a local HVAC company.

Or:

> **PROMPT**
> I already completed some MarketSpy research. Help me figure out what report I should create from it.

Because the Project contains the MarketSpy system, the AI can use the appropriate files, previous research, and MarketSpy Handoffs to continue the process without your guidance or effort on your part.

A Competitive Scorecard, for example, is designed to compare a business against competitors on evidence-supported factors and identify where the business wins, where competitors win, competitive gaps, and priority opportunities.

The Important Part

Don't feel like you need to use everything.

MarketSpy contains 43 specialized prompts because different projects require different types of intelligence.

A simple project might only require:

> **Market Mapper → Gap Finder → Executive Intelligence Brief**

A deeper client engagement might use several Spy prompts, one or two Reports, and multiple Sales prompts.

STEP 8

Add the Infographics

MarketSpy also includes 5 ready-to-use infographic templates that can turn important research findings into simple, visual client deliverables, as well as help you learn the MarketSpy system.

Use them to highlight competitive comparisons, market opportunities, key findings, trends, or recommendations without requiring the client to read a full report.

Upload the infographic templates to your MarketSpy Project so the AI can reference them when appropriate. You can ask MarketSpy to recommend the best infographic for your research and provide the content needed to complete it.

Tip: After completing your research, simply ask:

> **PROMPT**
>
> “Which MarketSpy infographic would best communicate the most important findings from this research? Create the content for it.”

You can then build your own infographics using report insights, which make great lead bait.

For example:

A Snapshot Of Pizza Prices in Smithtown, NY

MarketSpy is designed to reuse what it has already learned. As your Project grows, previous research, reports, and handoffs become part of the intelligence available for future work.

That is where the Project setup becomes particularly valuable.

You're building a reusable competitive research, reporting, and sales workspace.