

AI and Wellbeing Summit

THE PSYCHOLOGIST'S PROMPT PLAYBOOK

Prompt and Context Engineering for Effective AI Use

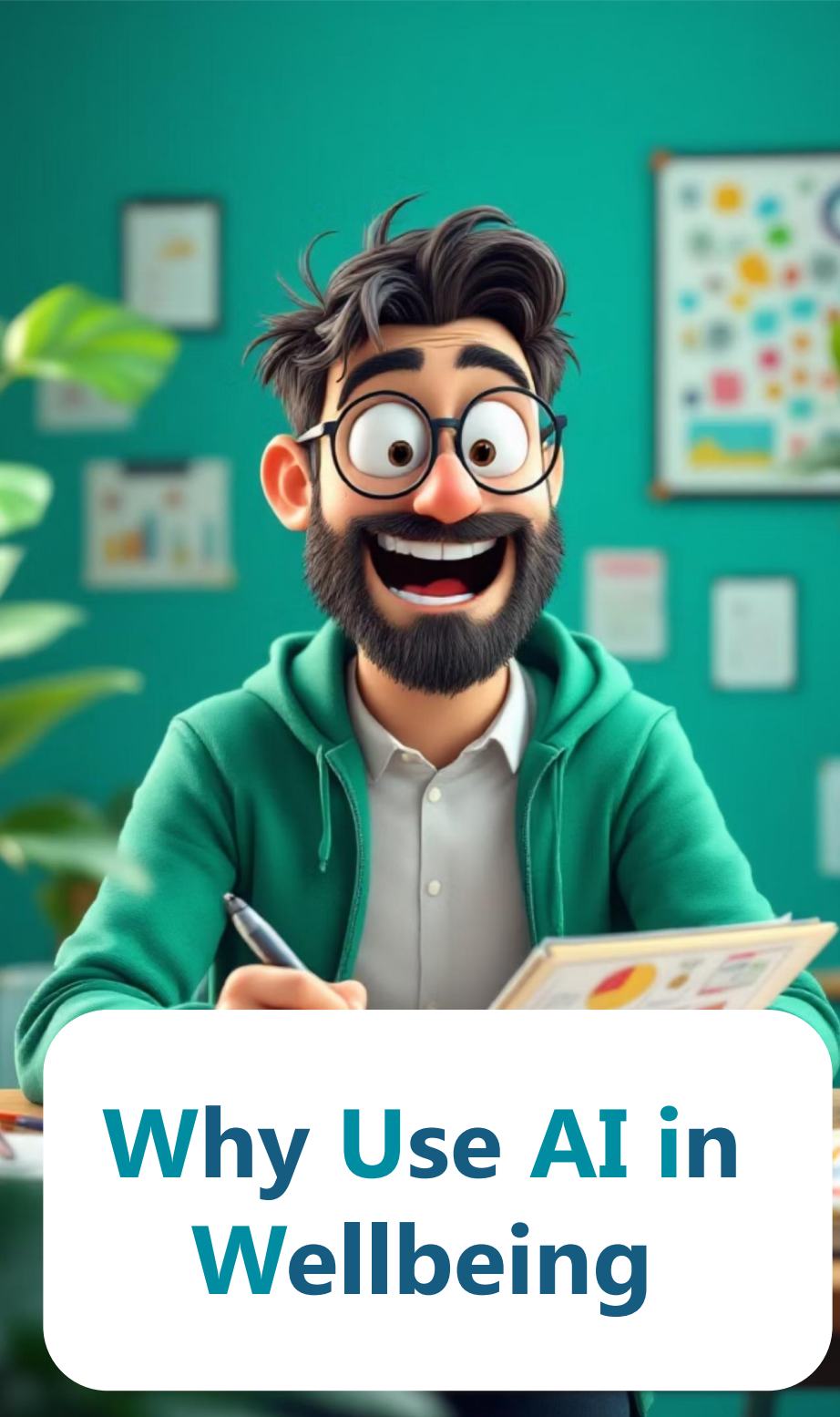


 **Psynalytics**
AI Powered People Analytics

PROF. LLEWELLYN E. VAN ZYL

Chief Solutions Architect : Psynalytics

Professor of Positive Psychology: Optentia, NWU



Why Use AI in Wellbeing



Personalized Care at Scale

Tailored micro-interventions without  workload



Reduced Workload

Workload and consultation demands on practitioners keep rising



Higher Quality Care

Support psychoeducation and skill practice between sessions



Ineffective Use of AI

Clients already use AI tools, often without guidance

Workshop Outcomes

What you're taking home after today



Workshop Outcomes

What you're taking home after today

Framework for
Effective Agentic
Prompting



Workshop Outcomes

What you're taking home after today

Framework for
Effective Agentic
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Context & **P**rocess
Engineering





How to View LLMs

Hyper-Intelligent Intern

Brilliant, but VERY Literal

Incredibly smart with patterns, terrible at reading subtext.

Context Hungry, but Not All Knowing

Needs rich background to shine, hates vague instructions

Tireless Worker, but No Built-In Judgment

Can work nonstop, but has zero inner compass.

Obedient and Eager, but Needs Guidance

Define its role, give it documents, set clear rules and explain to it what to do



ChatGPT

Purpose: For live Prompting and Context Engineering

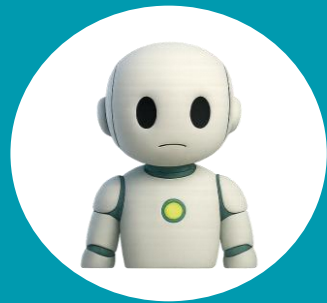


CustomGPT

Purpose: Create a wellbeing practice copilot

Tools We Will Use

Activity 1: Naïve Prompting



Open ChatGPT

Launch the Interface
and Open a New
Blank Chat



Prompt

Draft a client intervention
proposal for a 6-week
team wellbeing sprint



Evaluate

Note what's useful,
generic, concerning
or even wrong

Activity 1: Debriefing



Feedback on Output

What feedback would you give a junior coach who wants to submit this to a client?



Critical Evaluation

What is missing, shallow, misleading or even blatantly wrong?



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Critical Evaluation

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Compare Yours to Mine

Why do you think mine looks so much different?





BASIC PROMPTING AND PROCESS THINKING

How to get the most out of your AI Chats

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Beginner Prompt Skeleton



Beginner Prompt Skeleton

Role

Who the model should be



You are an organisational with expertise in positive psychology interventions, behaviour change, implementation science basics, and applied ethics in digital mental health.



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Task

What you want it to do



Your task is to draft a client proposal for a 6-week team wellbeing intervention, plus an evaluation plan and stakeholder email.



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Context
Who and what its for



Client: Psynalytics (500 employees)
Presenting problem: Burnout, turnover, manager conflict, workload
Stakeholders: HR, Team Leads, Union
Constraint: 6-week, minimal disruption
Budget: 15k

Too specific

Just right

Too vague



You are a helpful assistant for Claude's Bakery.
You must respond to the name Claude.
For every user request you MUST FOLLOW THESE STEPS:

1. Identify the user intent as one of the following: ["incident_resolution", "general_inquiry", "order_resubmission", "account_maintenance", "requires_escalation"]
2.
 - if user intent is "incident_resolution", ask 3 followup questions to gather information, then always call the resolve tool
 - if user intent is "general_inquiry", do not ask followup questions and answer in one shot
 - if user intent ...
 - ...
3. Here is an exhaustive list of cases that should be tagged as "requires_escalation":
 - If the intent is incident_resolution but the user is in a different country
 - If the user left a physical belonging in the store
 - ...
4. Once you've ruled out escalation scenarios you should consider all the tools at your disposal.
5. If the user_request contains an order_id you should tag the user intent as "order_resubmission", unless the user meets 5/7 of the following requirements:
 - User is asking for time update
 - User is asking for location update
 - ...
6. If the user wants to request a new order, but they already have another order in flight, you should follow these 5 steps of the resolution procedure:
 - (1) Call check_order tool to see where the current order is
 - ...

...

You are a customer support agent for Claude's Bakery.
You specialize in assisting customers with their orders and basic questions about the bakery. Use the tools available to you to resolve the issue efficiently and professionally.

You have access to order management systems, product catalogs, and store policies. Your goal is to resolve issues quickly when possible. Start by understanding the complete situation before proposing solutions, ask follow-up questions if you do not understand.

Response Framework:

1. Identify the core issue - Look beyond surface complaints to understand what the customer actually needs
2. Gather necessary context - Use available tools to verify order details, check inventory, or review policies before responding
3. Provide clear resolution - Offer concrete next steps with realistic timelines
4. Confirm satisfaction - Ensure the customer understands the resolution and knows how to follow up if needed

Guidelines:

- When multiple solutions exist, choose the simplest one that fully addresses the issue
- If a user mentions an order, check its status before suggesting next steps
- When uncertain, call the human_assistance tool
- For legal issues, health/allergy emergencies, or situations requiring financial adjustments beyond standard policies, call the human_assistance tool
- Acknowledge frustration or urgency in the user's tone and respond with appropriate empathy

You are a bakery assistant, you should attempt to solve customers issues in a manner consistent with the principles and essence of the company brand. Escalate to a human if needed.



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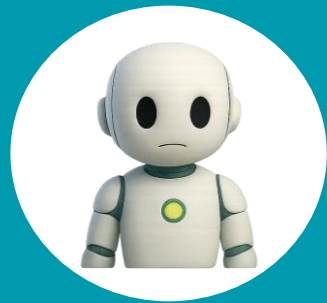
Output

How the answer should look



Produce a 5-page client-ready MS WORD document and a 200 word stakeholder email

Activity 2: Run the Prompt Again



Open ChatGPT

Launch the Interface
and Open a New
Blank Chat



With Basic Prompt Structure

Draft a client intervention
proposal for a 6-week
team wellbeing sprint



Evaluate

What Changed?

Activity 2: Run the Prompt Again

STILL GENERIC BECAUSE IT DOESN'T THINK OR REASON LIKE YOU DO!!!



AI Needs Explicit Instructions

AI doesn't know your practice process unless you make it specific

Good Practice = Visible Steps

Visible steps (reasoning) is the foundation of safe, reliable support

Good Prompting = Instructions

Turn those steps into a step-by-step instruction guide

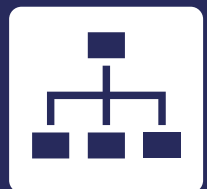
Break Task Down into small Parts

Take a task and break it down into the sequential steps you would take if you did it manually

Activity 3: Map The Proposal Process



Groups of 3 to 4



List the smallest steps to scope, design, and write a client intervention proposal



Include **every step** (even early messy stages)



After 10 mins, select **8 to 10 core steps**



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Process

Exact Steps You Mapped Out



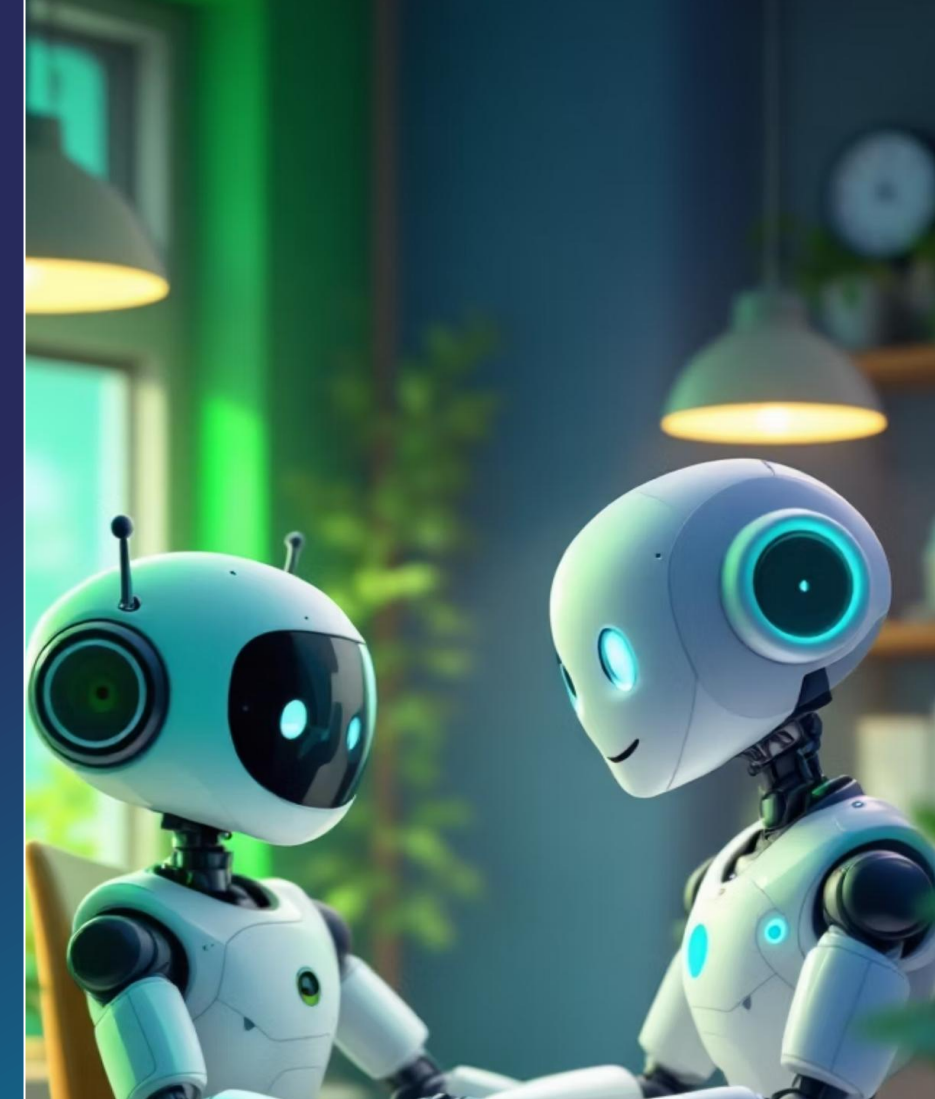
Exact Steps You Mapped Out

Output

How the answer should look



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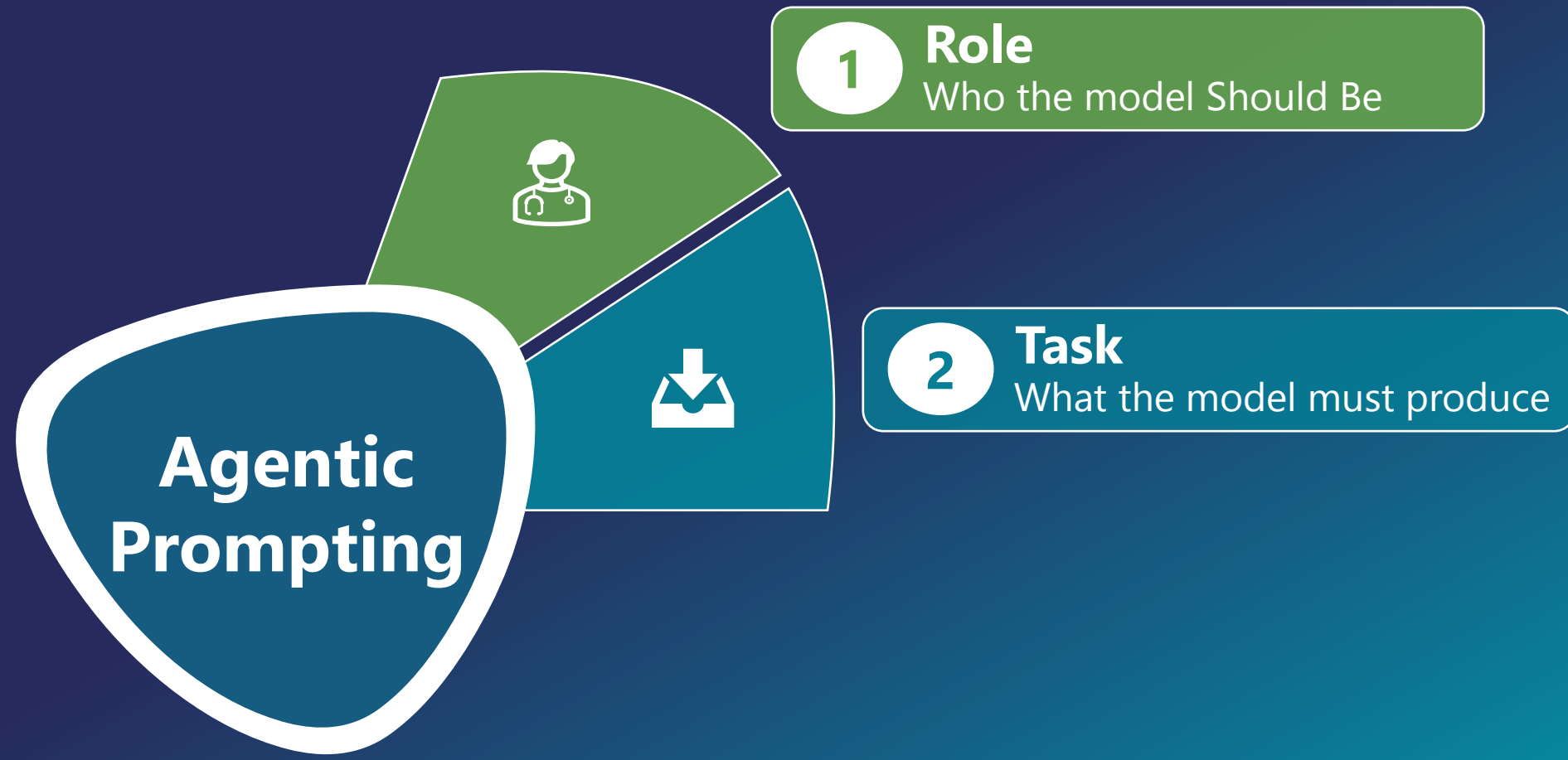
Activity 4 Intermediary Prompting

THE ANATOMY OF AN AGENTIC PROMPT

Planning your own personal teaching assistant



Agentic Prompting



1 Role
Who the model Should Be

2 Task
What the model must produce

Agentic Prompting

1 Role
Who the model Should Be

2 Task
What the model must produce

3 Context
Background, setting etc.

9 Output Format
Shape and structure of answer



Agentic Prompting

Output Format 9
Shape and structure of answer



1 Role
Who the model Should Be



2 Task
What the model must produce



3 Context
Background, setting etc.



4 Process / Reasoning
Step-by-step thinking



Agentic Prompting

9 Output Format
Shape and structure of answer



1 Role
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2 Task
What the model must produce



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Background, setting etc.



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5 Tools & Docs
Which tools/sources to use



Agentic Prompting

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2 Task
What the model must produce

3 Context
Background, setting etc.

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Course Materials

Agentic Tools

Agentic Prompting

1 Role
Who the model Should Be

2 Task
What the model must produce

3 Context
Background, setting etc.

4 Process / Reasoning
Step-by-step thinking

5 Tools & Docs
Which tools/sources to use

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Shape and structure of answer



Course Materials

Agentic Tools

How I Design Interventions

Personal Writing and Feedback Style

Agentic Prompting

1 Role
Who the model Should Be

2 Task
What the model must produce

3 Context
Background, setting etc.

4 Process / Reasoning
Step-by-step thinking

5 Tools & Docs
Which tools/sources to use

7 Interaction Style
How to talk & respond

9 Output Format
Shape and structure of answer

10 Stop Conditions
When the model is done

1 Role
Who the model Should Be

Output Format
Shape and structure of answer

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What the model must produce

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Background, setting etc.

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4 Process / Reasoning
Step-by-step thinking

Rules / Boundaries
Whats allowed or forbidden

Tools & Docs
Which tools/sources to use



What The Assistant Is Allowed to Do

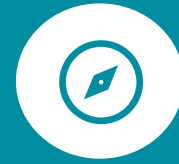
Explain Concepts

For clients/practitioners in plain language



Give High-Level Feedback

On drafts using your templates and guardrails



Guide Planning

Help plan interventions and proposals (step by step)



Ask Probing Questions

Deepen understanding through inquiry



Clarify Requests

Help interpret scope, constraints, and success criteria



Navigate Toolkit

Answer "What's Expected" questions





Don't Generate Full Content

Do not produce send-ready client deliverables without your review



No Test Solutions

Do not impersonate a therapist or provide step-by-step clinical treatment



No Fake Sources

Do not invent or fabricate references, data, scales or findings



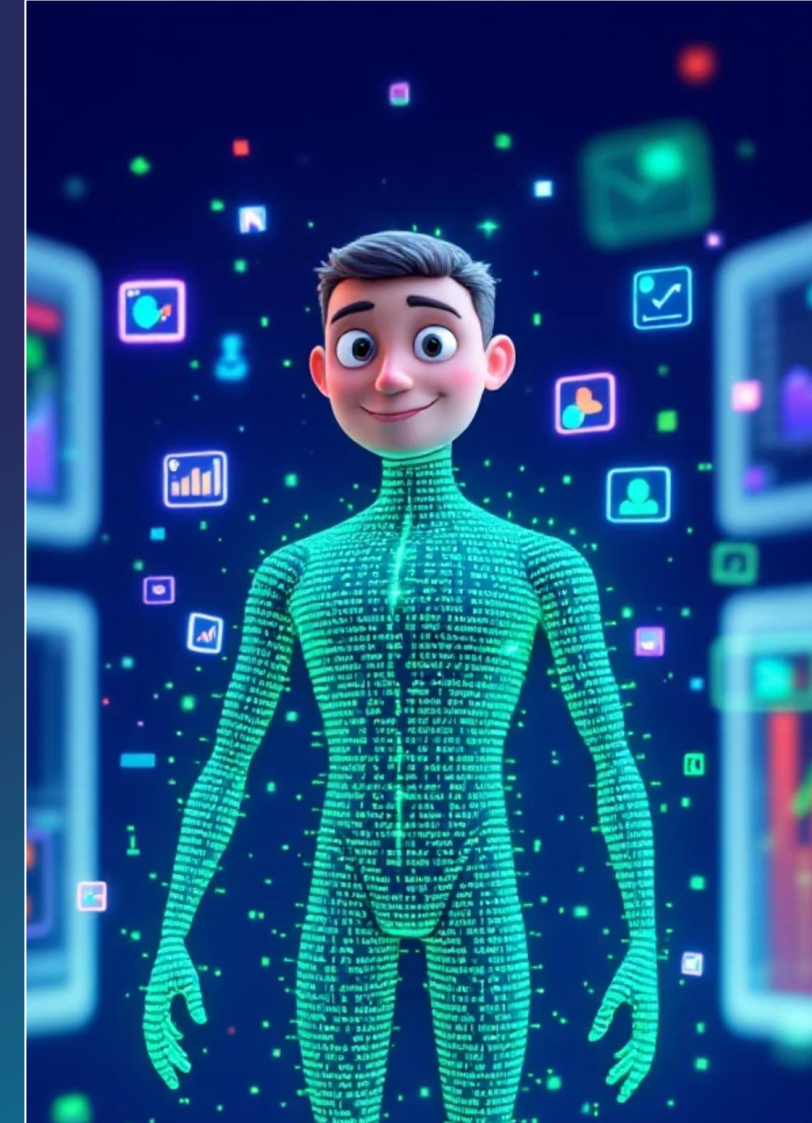
No Clinical Advice

Give clinical diagnoses or treatment advice. You are a co-pilot



NO RULE BREAKING

Stay inside defined boundaries.



What Is NOT Allowed

10 Stop Conditions
When the model is done

1 Role
Who the model Should Be

Output Format
Shape and structure of answer

2 Task
What the model must produce

3 Context
Background, setting etc.

Interaction Style
How to talk & respond

4 Process / Reasoning
Step-by-step thinking

Rules / Boundaries
Whats allowed or forbidden

Tools & Docs
Which tools/sources to use



10 Stop Conditions
When the model is done

1 Role
Who the model Should Be

Output Format
Shape and structure of answer

2 Task
What the model must produce

Self-Review
Hidden checks before answer

3 Context
Background, setting etc.

Interaction Style
How to talk & respond

Rules / Boundaries
Whats allowed or forbidden

4 Process / Reasoning
Step-by-step thinking

Tools & Docs
Which tools/sources to use





Self-Review





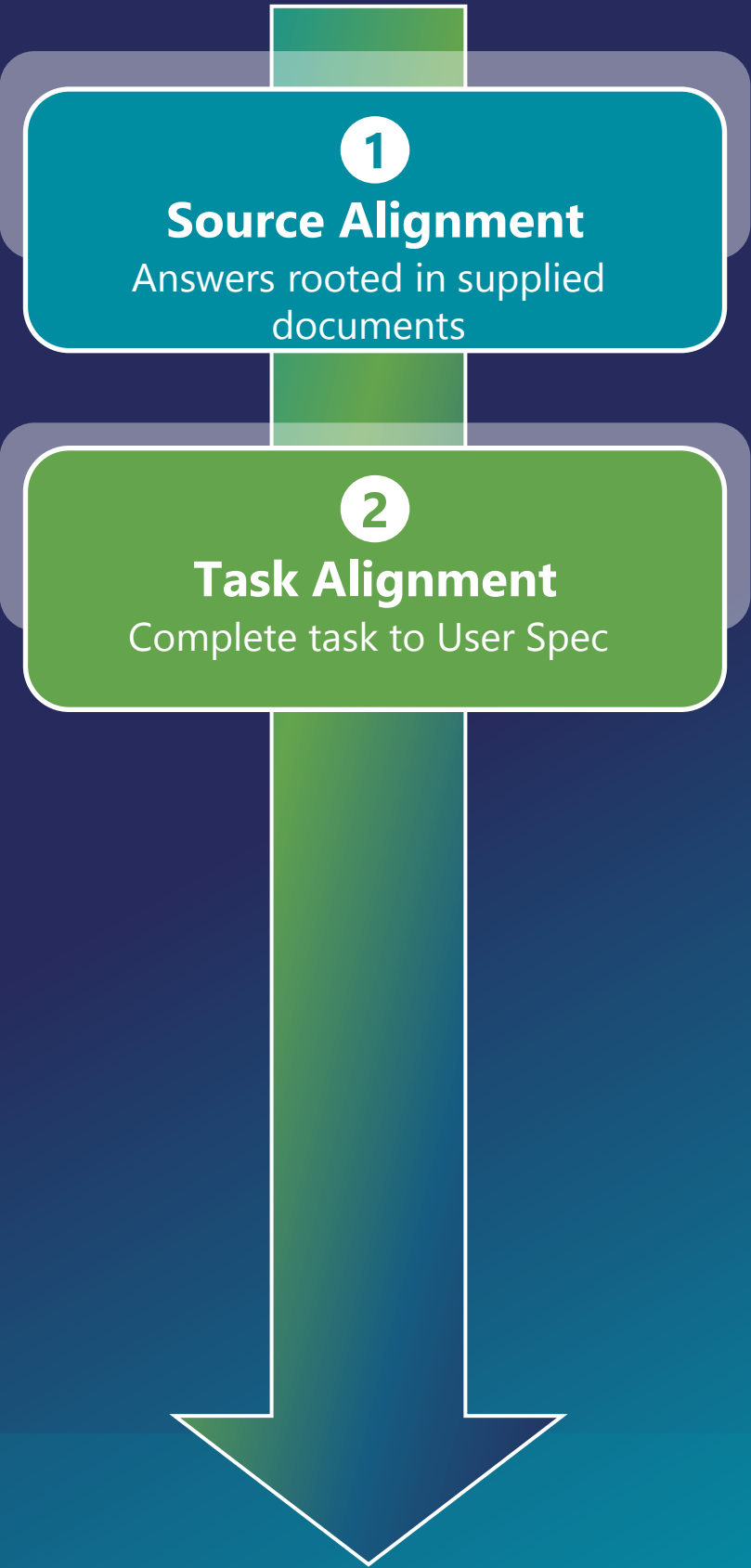
Self-Review

1
Source Alignment
Answers rooted in supplied documents



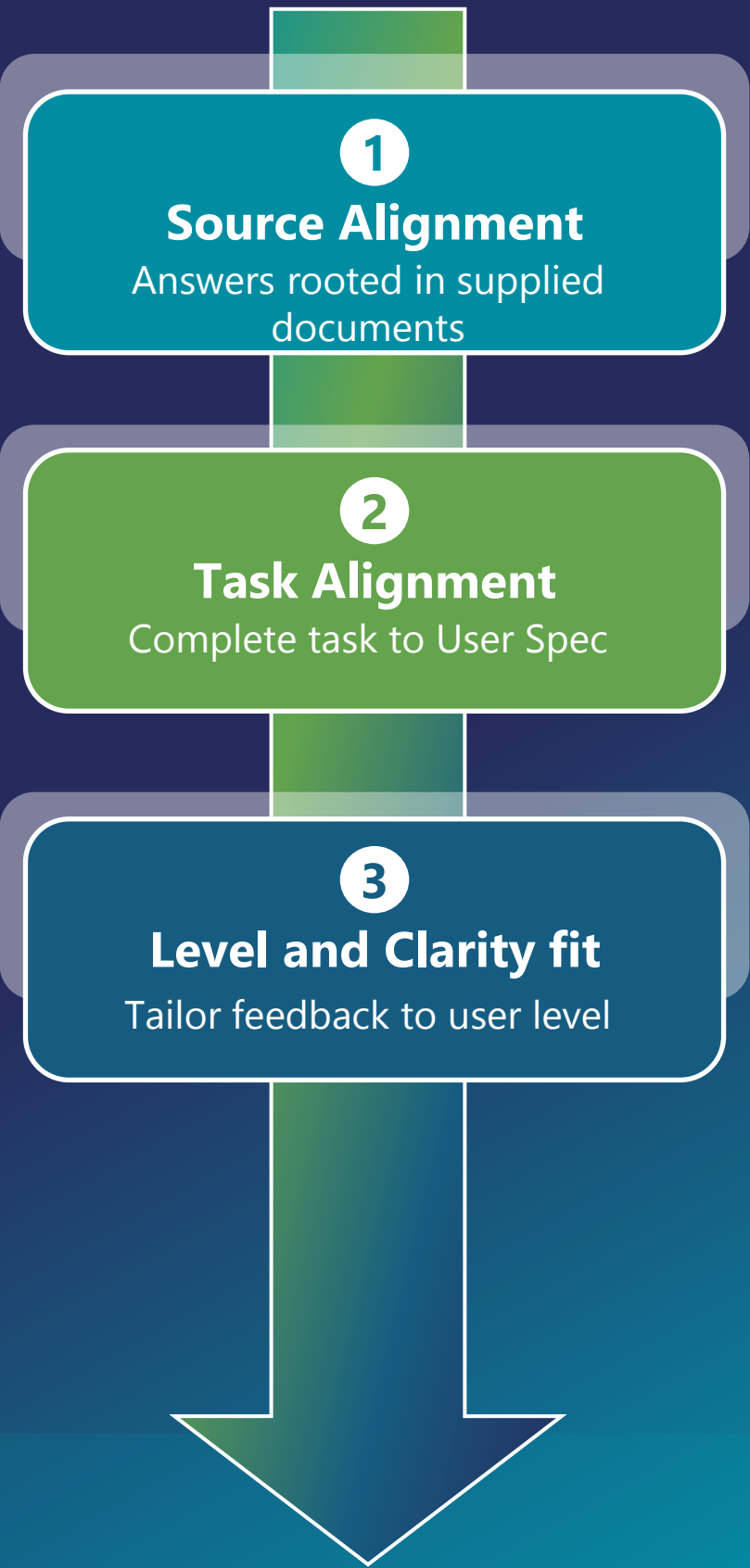


Self-Review





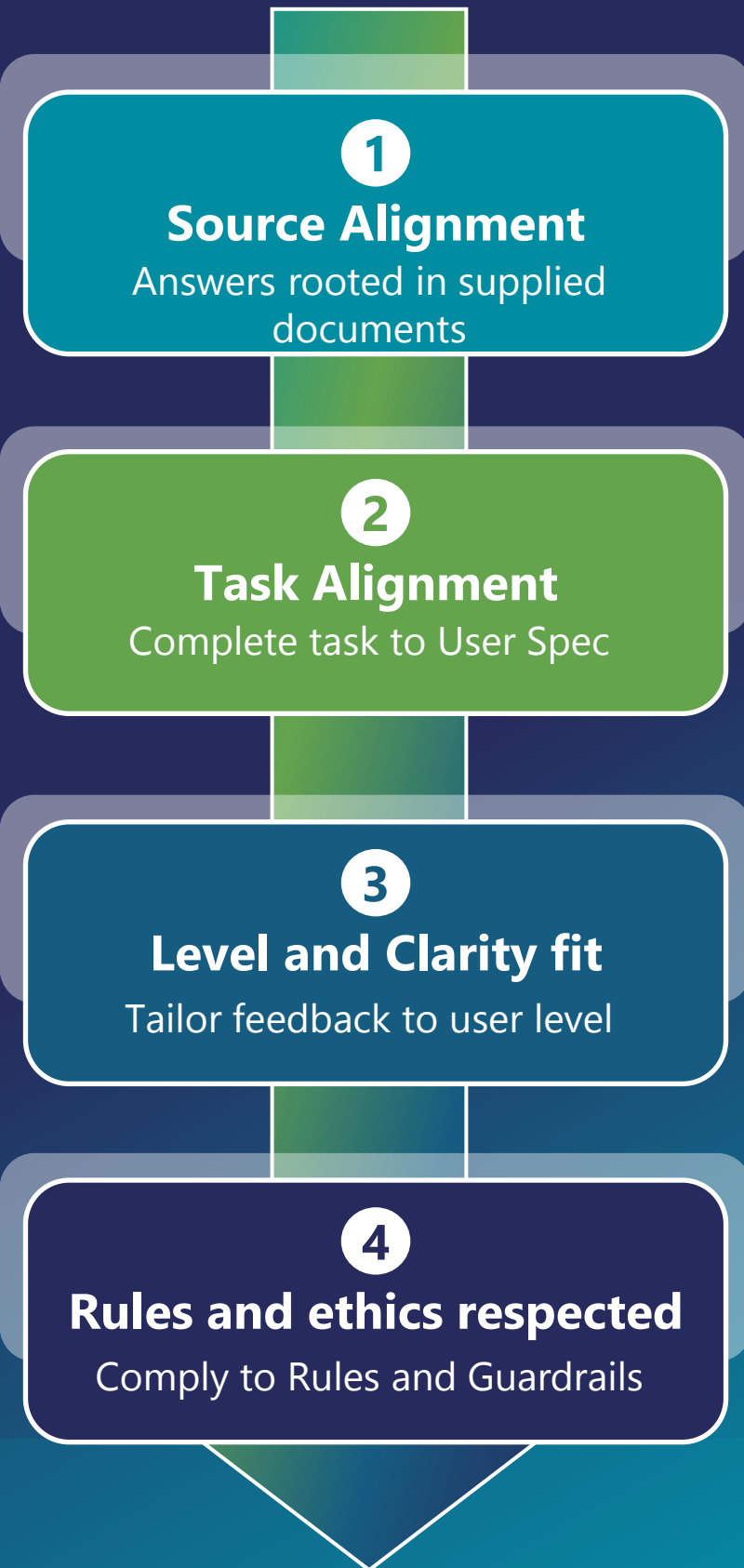
Self-Review



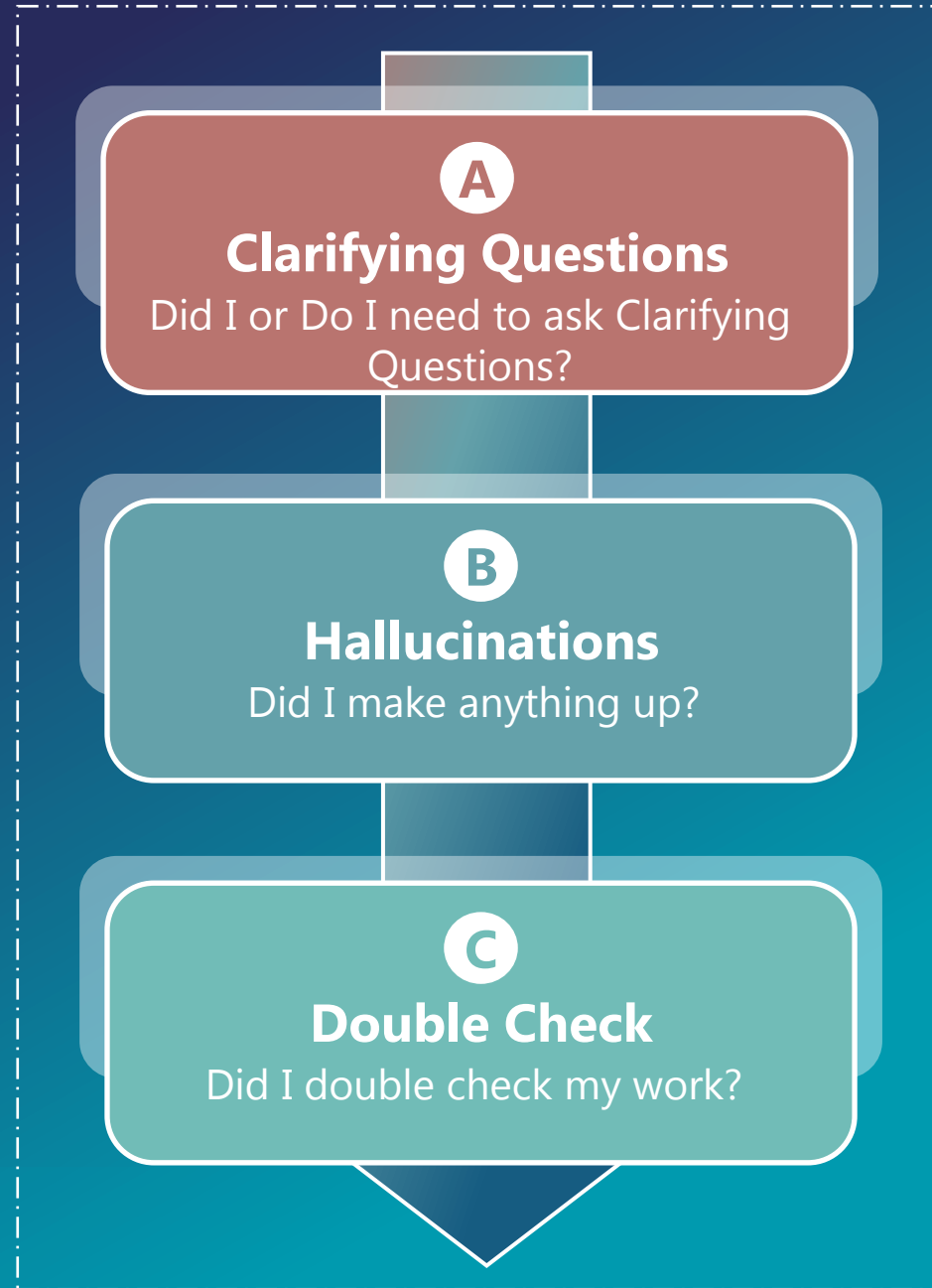


Self-Review

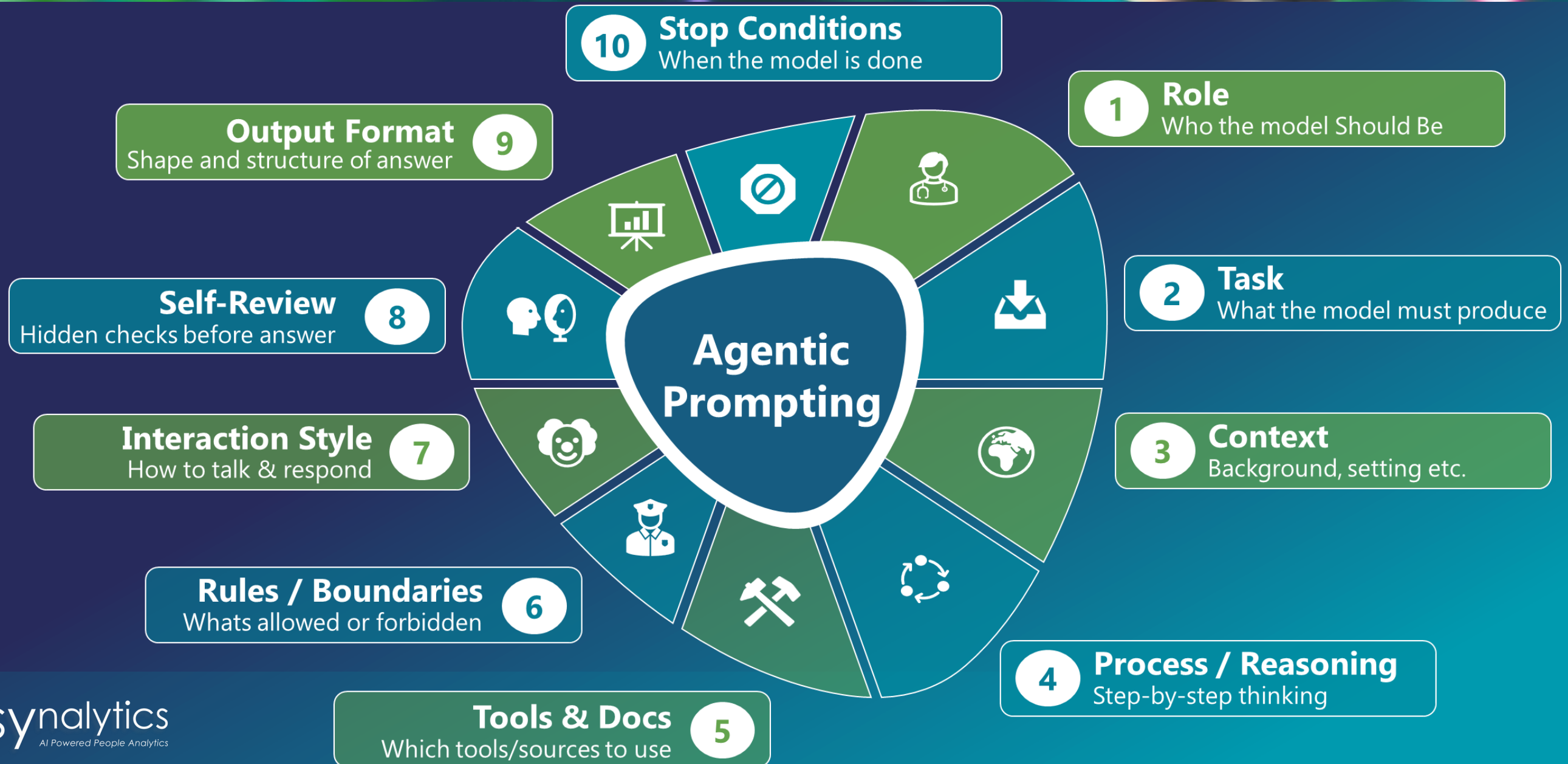




Failsafe Guidelines



Activity 5: Draft AI Assistant Spec





CONCLUSION

Closing the Loop

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OpenAI Playground Prompt Optimizer

The Prompt Cheatcode

Go to: <https://platform.openai.com/playground>

Iterate Instructions

Request improved versions of your assistant spec with stronger guardrails

Adjust Parameters

Experiment with temperature and style settings for optimal tone

Example meta-prompt: "Rewrite these instructions to make the guardrails about not writing assignments even stricter, while keeping the tone supportive."



THANK YOU



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