Stop Rewriting the Same Status Five Ways: Prompt Kit

One source, every audience, your judgment on top. Bert Carroll · The Momentum Effect · Oct 27, 2026

How to use this kit

1. Keep one project source, current, in one place you control (template in section 1).
2. Start each conversation by pasting the ground rules (section 2) and your source.
3. Ask for one audience at a time with a render prompt (section 3).
4. Run the escalation check before anything goes up the chain (section 4).
5. Read it, fix it, and sign it. Your name is on it.

Optional: section 5 shows where the work is stuck. Section 6 makes the case to your sponsor.

Use the AI tool your organization approves, and only paste information your policy allows. Every step works in a plain document with no AI at all.

1 The project source

AI guesses when it gets a pile. It does well with a process. This is the process: the facts, kept current, in one place.

```
PROJECT:            [name]                        AS OF: [date]
STATUS:             overall [R/A/G] | schedule | budget | scope | why
KEY NUMBER:         [the one number leadership should see]
DECISIONS NEEDED:   [what] | from [who] | by [date] | my recommendation: [ ]
ASK (open questions):        [question] | who must answer | due
ANSWER (decided or built):   [item] | not yet verified because [ ]
PROVE (verified):            [item] | waiting on acceptance from [who] since [date]
DATES:              [milestone] | planned [date] | forecast [date] | why it moved
BUDGET:             approved [ ] | spent [ ] | forecast at completion [ ]
                    variance cause [ ] | change request needed [yes/no]
THIS WEEK:          [task] | owner | due | status
RISKS AND BLOCKERS: [item] | owner | next step | unblock date
CHANGED SINCE LAST UPDATE: [item] (client or internal)
AUDIENCES:          [exec] [finance] [client] [team] [PMO template]
```

2 Ground rules: paste these first, every time

```
You are helping me turn one project source into updates for different
audiences. Follow these rules for everything in this conversation:
1. Use only facts in the SOURCE. Do not add facts, estimate, or guess causes.
   You may calculate totals, percentages, and variances from SOURCE numbers;
   mark each one (calculated).
2. If something you need is missing, write [MISSING: what] instead of guessing.
3. Keep every number, date, and name exactly as written in the SOURCE.
4. Use the format I ask for and nothing extra.
5. After each draft, list SOURCE items that conflict with each other and any
   fields left blank.

SOURCE:
[paste your project source here]
```

3 Render prompts: one audience at a time

Executive

```
Write an executive update, three lines at most:
1. Headline status and the date that matters.
2. The one number that matters.
3. The decision I need, from whom, by when,
   and my recommendation.
End with: "Detail available on request."
Include a risk only if it needs their decision.
```

Finance

```
Write a finance update as a table:
approved, spent to date and percent,
forecast at completion, variance and its cause,
and whether a change request is needed
(yes or no). No narrative.
```

Client

```
Write a client update in plain language,
under 120 words: the next milestone and date,
what we need from them and by when, and
changes marked (client). Leave out internal
budget and vendor details.
```

Team

```
Write a team update as bullets: this week's
tasks with owners, blockers with owner and
unblock date, and decisions made since the
last update.
```

Your required template (PMO, steering deck, Jira field)

```
Fill in this template using only the SOURCE. Leave any field blank that the
SOURCE does not cover, then list the blanks so I can fill them.
TEMPLATE:
[paste your required template here]
```

4 The escalation check: before anything goes up

```
Review this draft before I send it to [role]. Answer:
1. For each item: is this decision theirs, or can it be resolved at my level?
2. What exactly do I need from them?
3. Is my recommendation stated?
4. What did I already resolve that I can leave out?
5. Where is the detail if they want it?
Then rewrite the draft with only the items that need them, under 100 words.
DRAFT:
[paste draft]
```

5 Ask, answer, prove: find where the work is

```
From the SOURCE, sort every open item into:
ASK: a question not yet answered
  (who must answer),
ANSWER: decided or built, not yet verified,
PROVE: verified against acceptance criteria,
  waiting on acceptance (who must accept).
Then write one line per group for
leadership that names who needs to act.
```

6 Make the case in leadership's KPIs

```
Here is my log of the status updates I
produce: [audiences, versions, hours per
week, decisions requested, decisions
received and when]. Write one paragraph for
my sponsor proposing a one-quarter pilot on
one project. Frame it only in: hours saved
per week, errors from mismatched versions,
time from status sent to decision made, and
meetings or reports we could retire.
Do not promise more output.
```