AI for Non-Techies: 3 Ways to Become More Productive with AI

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ICEBREAKER

What is one unusual talent or skill you have?

Put it in Zoom chat!

Agenda

- Introduction
- The essentials you need to know
  - Prompts
  - Platforms
  - Privacy
  - Perfection (or lack thereof)
- Quick Win #1: email makeover
- Quick Win #2: taming the email thread monster
- Quick Win #3: "Can I get that by the end of the day?"
- Final thoughts and next steps

Introduction

- Who I am and why I am teaching this
- By the end of 30 minutes you'll complete 3 real workplace tasks with GenAI and no code
- **Ground rule:** there is no such thing as a dumb question. GenAI is new for everyone!

What is GenAI?

- Like having a very smart assistant who can read, write and analyze
- Needs clear instructions
- Works with plain language, NOT code
- **Prompt:** your instructions to the AI
  - Better instructions = better results
    - Provide **context**!
  - You can always try again
    - The "retry" button
    - Correct it in plain language in the next prompt!

Quick technical must-know's

- Today's talk is platform agnostic
- You do not need to have a paid subscription for this talk
- Copy/paste is your friend!
- Privacy basics
  - Do not paste confidential or proprietary information
  - Treat it like you would email
- It's not perfect
  - You are still the expert
  - The "blank page problem"

Quick Win #1:

The email makeover

The scenario

- You got an email asking you to be on (yet another!) committee
- You are already over subscribed
- The email sender is someone you want to maintain a good relationship with
- You don't *want* to say no, but really need to
- You spend a lot of time drafting a reply and are not happy with it

The problem

- Saying "no" professionally is hard and time-consuming
- We over-explain to avoid seeming rude or lazy
- Too much information
- The result: Long emails that bury the point and waste time
- You need: Clear, warm, brief

Subject: RE: Volunteer Opportunity - New Membership Committee

Hi Jennifer,

Thanks so much for thinking of me for the membership committee. I really appreciate that you thought I'd be a good fit and I'm honestly flattered that you reached out. The work you're doing with membership is really important and I know the committee has accomplished a lot this year.

I have to be honest though - I'm really struggling right now with my workload. I'm already on the Events Committee (which has been taking up way more time than I expected, especially with the conference coming up in March), and I also got pulled into the Website Redesign Task Force back in October, which they said would only be a few hours a month but it's turned into basically a part-time job. On top of that, my actual job has gotten really busy because we're short-staffed after Lisa left, and I'm covering some of her accounts until they hire someone new, which who knows when that will be.

I'm also trying to be better about work-life balance this year because last year I basically burned out in November and it wasn't great. My family has been really patient but I've missed a lot of stuff and I'm trying to be more present at home.

So unfortunately I don't think I can take on another committee right now. I wish I could because like I said, the work is really important, but I just don't think I'd be able to give it the attention it deserves and I'd hate to commit and then not be able to follow through. That wouldn't be fair to you or the rest of the committee.

Maybe next year when things calm down? Or if there's something smaller I could help with that doesn't require coming to all the meetings, let me know. I'd be happy to help in some other way if there's something that makes sense.

Again, thanks for thinking of me!

Best,
Clair

The solution prompt

Rewrite this email to politely decline the committee invitation. Make it:

- Warm and professional
- Brief (3-4 sentences maximum)
- Clear about saying "no" without over-explaining
- Offer to help in a different way

Here's the email: (copy and paste)

Even better…

I need to write an email declining a committee invitation. Here's the situation:

- Jennifer asked me to join a new Membership Committee for our professional association
- I need to say no because I'm already on 2 other committees and my job is busy
- I want to sound warm and professional, not rude or lazy
- I'd like to offer to help in some other smaller way if possible

Please draft a brief, polite email (3-4 sentences) that declines gracefully.

Quick Win #2:

Taming the email thread monster

The scenario

- You just got back from vacation to a ton of unread emails
- One email is a lengthy chain with tons of forwards and replies about Project X, which is due on February 28th
- Another email is from your boss asking for an update on the status of Project X in 1 hour to include:
  - Are we on track for the deadline?
  - Are we on budget relative to the original $440k budget?
  - Are there any blockers?
  - Is the project in good shape or in trouble

The problem

https://raw.githubusercontent.com/ClairSullivan-Associates/maven_gen ai_3_wins/refs/heads/main/email.txt

The solution prompt

I'm preparing a status update for my boss who has a board meeting Monday.
She needs to know the status of Project X, which is supposed to launch by
end of February.

Please review this email thread and summarize:

1. Are we on track, ahead, or behind schedule? What's the current launch
date?
2. What's the budget status? Are we over or under?
3. Are there any current blockers or issues that need attention?
4. Overall project health - is everything ready?

Please provide a brief summary with 3-5 key bullet points.

[paste entire email thread]

Quick Win #3:

"Can I get that by the end of the day?"

The scenario

- You work for a company that sells commercial kitchen equipment distributor based in Denver serving restaurants, hotels, and ski resorts across Colorado, Utah, and Wyoming
- You are at your desk and it is 4:19 pm on Friday
- Your Slack/Teams dings with you boss sending you a DM
- They have a 54 page document (the Federal Reserve Beige Book) that they have just sent you full of complicated economic information
- They ask "Hey, I need you to pull the key insights from this so I can brief the board on how current economic conditions might affect our business selling the Mountain West. Just give me the highlights on what is happening with consumer spending, restaurants, retail, and anything else related to our market."
- "I need it before you leave for the day."

The problem

https://www.federalreserve.gov/monetarypolicy/files/BeigeBook_20260114.pdf

The solution prompt

I work for a commercial kitchen equipment distributor based in Denver serving restaurants, hotels, and ski resorts across Colorado, Utah, and Wyoming (the Mountain West region). Our VP needs to brief the board Thursday on the health of the restaurant and hospitality sector in our market.

Please review this Federal Reserve Beige Book and summarize:
1. What's happening with consumer spending at restaurants in the Mountain West/Western regions?
2. Are there differences between high-end dining vs. casual/quick-service restaurants?
3. Any regional factors (weather, tourism, consumer behavior) affecting restaurant demand?
4. What's the outlook - should we expect restaurants to be investing in equipment or holding back?

Keep it focused on actionable insights for our sales and inventory planning.

Here is the Beige Book: (copy and paste)

Final thoughts

- Context is king
  - Tell AI who you are and what you need
- You can (and should!) always iterate
- AI writes fast, but you still decide if it is right
- Specificity wins
  - "Make it professional" versus "make it better"
- Just get started!

Thank you!

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