

By Ethan Lawrie

# Session 3 - Leveraging AI in Your Specific Role

PRACTICAL AI LITERACY FOR WORK



# Learning Outcomes Overview

## KEY SKILLS TO ACHIEVE BY SESSION END

- Map your current work flows and tasks and spot whether it can be leveraged with AI assistance.
- Choose a pilot use case for your self and define a clear scope and metrics for success
- Define inputs, outputs, and guardrails without complex prompting.
- Leave with a 2-week pilot plan you can run straight away.

# Agenda Overview

**PRE-QUIZ**

**LEARNING 1**

**ACTIVITY 1**



# Agenda Overview Cont.

**LEARNING 2**

**ACTIVITY 2**

**LEARNING 3**

**POST QUIZ**



# Pre Quiz

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*This quiz is to gauge your current understanding of AI,  
high correct rates are not expected*



## Pre Quiz - Question 1

### **FIRST STEP TO FIND WHERE AI CAN HELP IN YOUR ROLE?**

- A) List tools you want to try
- B) Map 8–10 tasks as Input → Process → Output
- C) Ask a colleague what they use
- D) Read industry news



## Pre Quiz - Question 1

**FIRST STEP TO FIND WHERE AI CAN  
HELP IN YOUR ROLE?**

- B) Map 8–10 tasks as Input → Process → Output



## Pre Quiz - Question 2

### **WHICH IS THE BEST PILOT CANDIDATE?**

- A) “Automate hiring decisions end-to-end”
- B) “Write final legal letters”
- C) “Draft 4-bullet weekly deal recap from a customer information document for a sales lead”
- D) “Do everything faster with AI”



## Pre Quiz - Question 2

### **WHICH IS THE BEST PILOT CANDIDATE?**

- C) “Draft 4-bullet weekly deal recap from a customer information document for a sales lead”



## Pre Quiz - Question 3

### **WHAT MAKES AN OUTPUT EASY TO USE?**

- A) Long paragraphs
- B) Any format, model decides
- C) Fixed format with fields, order, and length caps
- D) Emojis for emphasis



## Pre Quiz - Question 3

**WHAT MAKES AN OUTPUT EASY TO USE?**

- C) Fixed format with fields, order, and length caps



## Pre Quiz - Question 4

# **WHAT SHOULD YOU BASELINE BEFORE A 2-WEEK PILOT?**

- A) Minutes per item on 5–10 manual samples
- B) Team mood
- C) Number of meetings held
- D) Laptop model



## Pre Quiz - Question 4

**WHAT SHOULD YOU BASELINE  
BEFORE A 2-WEEK PILOT?**

- A) Minutes per item on 5–10 manual samples



## Pre Quiz - Question 5

### **WHEN SHOULD YOU AVOID CHOOSING A TASK AS A PILOT?**

- A) It has clear inputs and a named consumer
- B) It involves people decisions or legal outcomes
- C) It is repetitive and text-heavy
- D) It has a simple table output



## Pre Quiz - Question 5

### **WHEN SHOULD YOU AVOID CHOOSING A TASK AS A PILOT?**

- B) It involves people decisions or legal outcomes



## Pre Quiz - Question 6

**IF NO ONE WILL USE THE OUTPUT  
TOMORROW, YOU SHOULD...**

- A) Run the pilot anyway
- B) Make the output longer
- C) Rename the pilot
- D) Redefine the output and consumer or pick another task

## Pre Quiz - Question 6

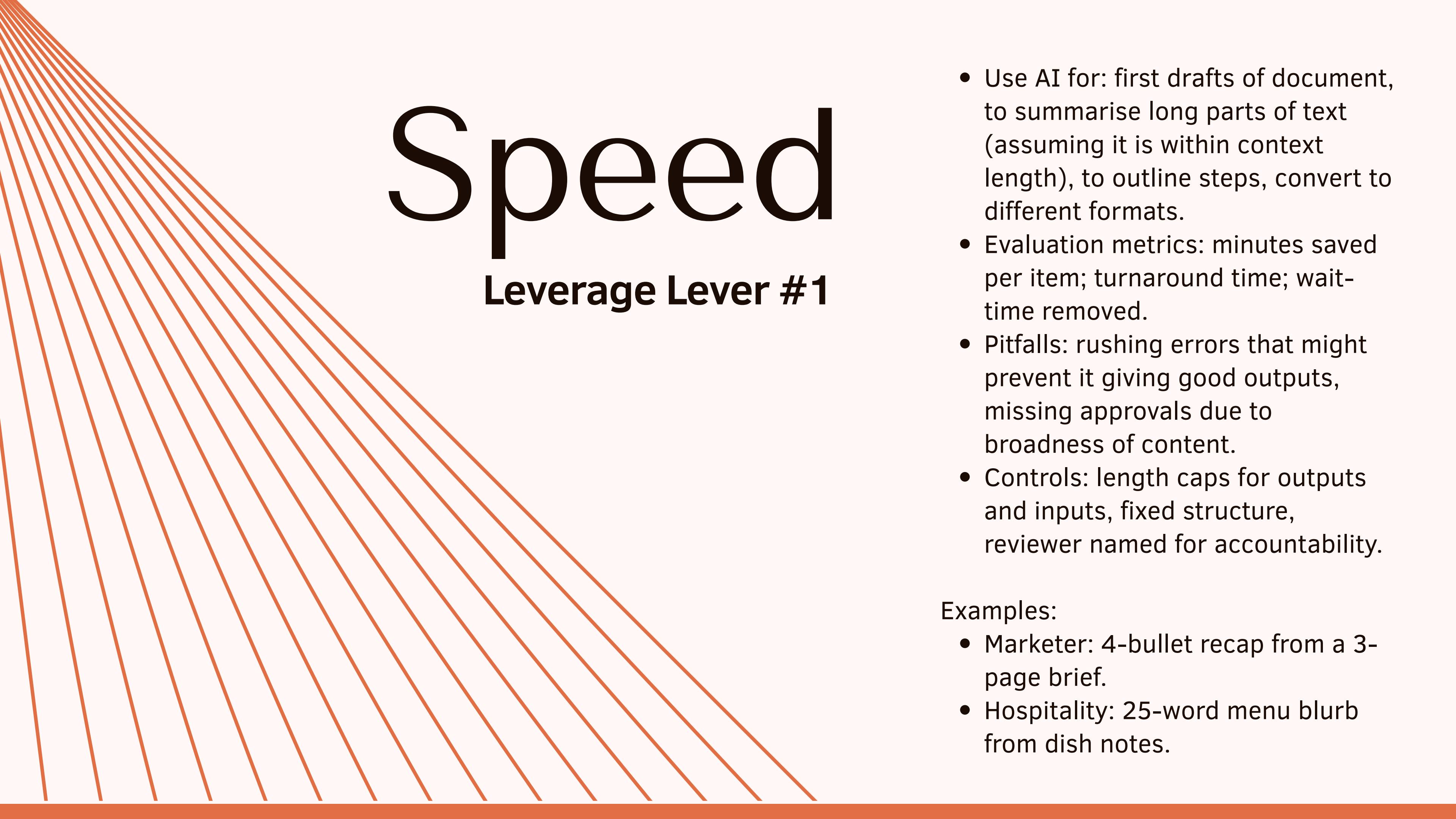
**IF NO ONE WILL USE THE OUTPUT  
TOMORROW, YOU SHOULD...**

- D) Redefine the output and consumer or pick another task

# Leverage levers - Where can AI actually help?

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- Four levers: Speed, Quality, Throughput, Consistency (discussed in later slides).
- Good fits for leveraging AI: drafting, summarising, extracting, classifying, simple planning, etc
- Weak fits: company strategy that should be thought through by a person, legal wording, people decisions, novel research without sources.
- In places that indicate an AI assist would be likely beneficial: repetitive text, copy-paste steps, format conversions, rules already written somewhere.
- Red flags: missing consent, no source of truth, high consequence if wrong.



# Speed

## Leverage Lever #1

- Use AI for: first drafts of document, to summarise long parts of text (assuming it is within context length), to outline steps, convert to different formats.
- Evaluation metrics: minutes saved per item; turnaround time; wait-time removed.
- Pitfalls: rushing errors that might prevent it giving good outputs, missing approvals due to broadness of content.
- Controls: length caps for outputs and inputs, fixed structure, reviewer named for accountability.

Examples:

- Marketer: 4-bullet recap from a 3-page brief.
- Hospitality: 25-word menu blurb from dish notes.

# Quality

## Leverage Lever #2

- Quality goals: correctness of the content, how clear is it, is it fully completed.
- Use AI for: technical content to plain-language rewrites, finding missing fields in data.
- Metrics: differences from the final version, amount of times reworks have to be done, how readable it is.
- Pitfalls: the quality content could be hallucinated and fool you, the style drifts from what was intended.
- Controls: get the AI to tell source id +date, outline the must-include fields, “cannot determine” rule.

### Examples:

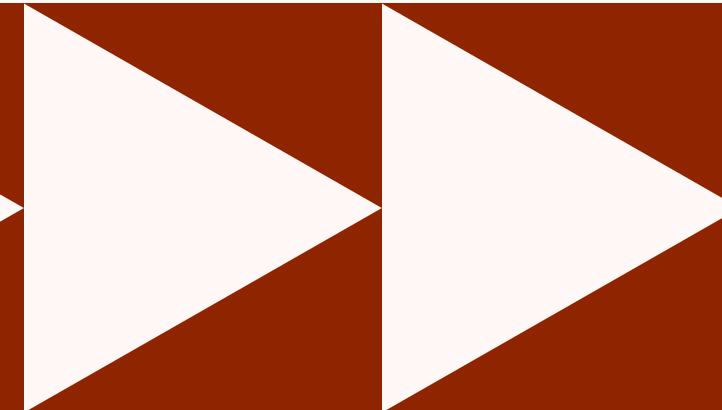
- HR: change a policy note to be at a Year-9 reading level for simplicity.
- Sales: check a email quote and determine whether it contains the 3 fields needed or not.
- Support: Get the steps from a help thread

## Leverage Lever #3

# Throughput

### Examples:

- Marketer: generate 30 product bullet points from a table of data .
- Ops: label 200 tickets by category and urgency.
- Restaurant: make daily blurbs for 7 specials from a sheet.



- Goal: to handle many items efficiently
- Use AI for: batch info from a CSV file, bulk classification of data
- Metrics: number of items per hour that were done, number of times the AI takes to get an item right and passed/validated.
- Pitfalls: at scale there may be lots of errors, rate limits by the AI tools used
- Controls: random spot check on the outputs, only allowing fixed values else it's a fail.

# Consistency

## Leverage Lever #4

- Meaning: making sure that it has the same fields, same order and same type of output every time.
- Use AI for: enforce a particular schema output, template filling.
- Metrics: How often it is actually fitting to the schema, how often it changes in tone.
- Pitfalls: free-text drift; synonym noise.
- Controls: closed lists of outputs it can use (eg approve, revise, don't continue), having a glossary link, enforcing a max words per field.

### Examples:

- Finance: expense summaries in fixed JSON fields.
- HR: role ads using approved glossary.
- Support: resolution notes with identical 6 fields.

# Pre-Activity Primer - Role Workflow Examples

See if you can find examples similar to your role from the ones listed

## HR

- Job ad draft → plain-language rewrite → 5 bullets (role, must-haves, benefits, apply link) → metric: amount of edits needed
- Policy note → key-point pull-out → JSON in the form {rule, quote, source id, date} → metric: amount of missing fields

## Operations

- Incident log lines → status update → 1 paragraph  $\leq 70$  words → metric: turnaround time to fix
- SOP text → escalation card → JSON {severity, ack\_minutes, update\_minutes, contacts[]} → metric: how often did it adhere to the JSON schema

## Sales

- Customer notes → weekly deal summary → table in the form {account, stage, next\_action, risk} → metric: amount of preparation time.
- Product specs → short FAQ → 3–5 bullets → metric: whether stakeholder questions are repeated

## HR

- Expense policy → claim check → JSON {required\_docs[], caps\_AUD, submit\_window\_days} → metric: rework on missing items

# Pre-Activity Primer - Role Workflow Examples 2

See if you can find examples similar to your role from the ones listed

## IT / Support

- Ticket backlog → prioritising labels → table {id, category, urgency, next\_step} → metric: how much times does it route to the wrong thing.
- Release notes → user-facing summary → 3 bullets → metric: How readable is it (percentage of people who can)

## Hospitality / Retail

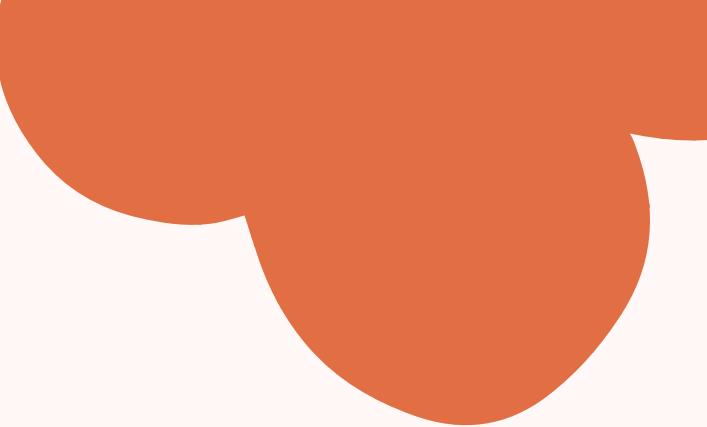
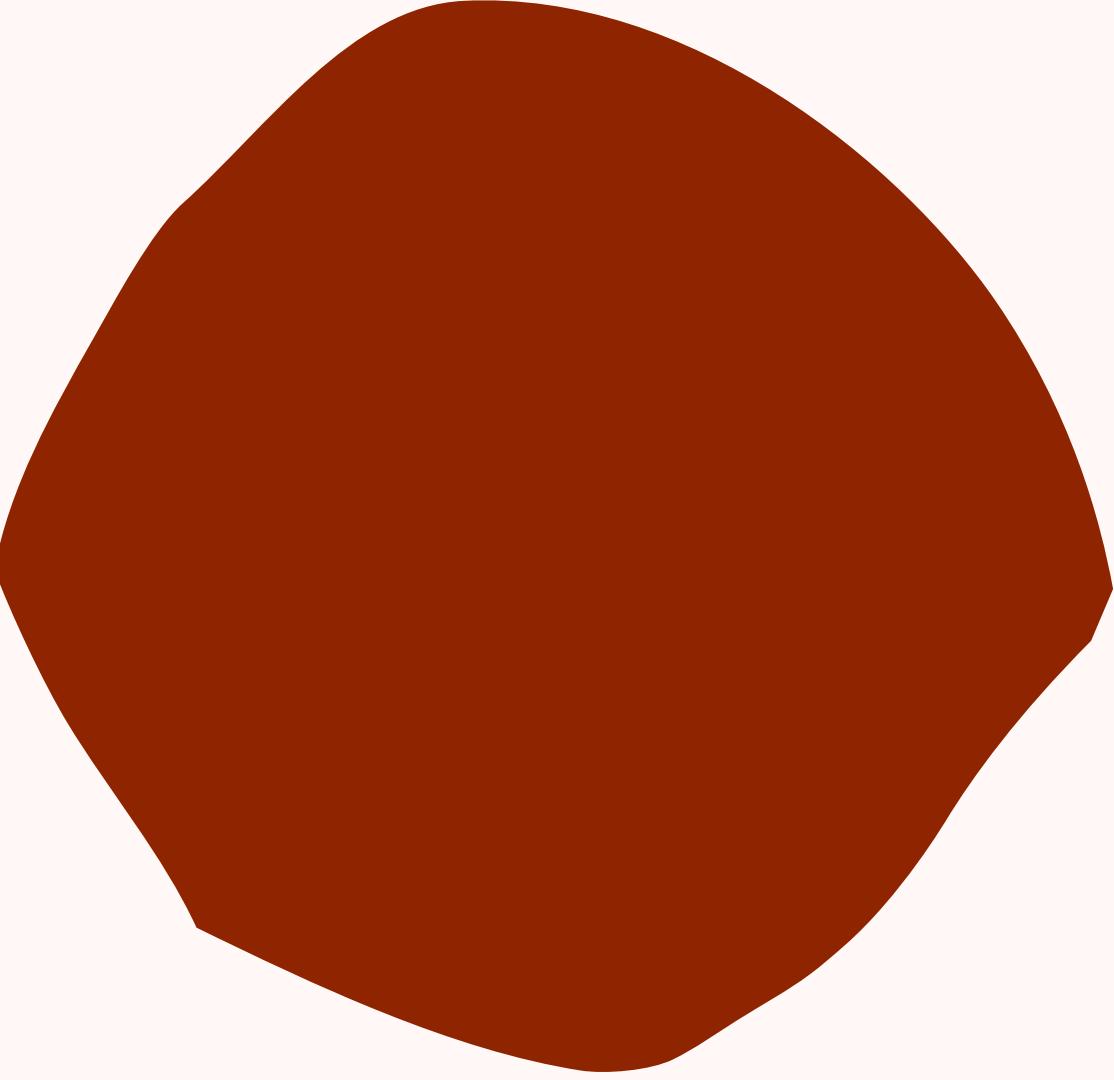
- Dish notes → menu blurb → 3 bullets (title, description ≤25 words, options[]) → metric: time taken per item
- Stock list → reorder shortlist → table {item name, min, number on hand, action} → metric: how much times where something has been out of stock because it wasn't included.

## Marketing

- 3-page brief → campaign recap → 4 bullets → metric: stakeholder approval rate
- Product table → meta descriptions → CSV columns → metric: Number of edits that have to be made on each of the product items

## Admin

- Meeting notes → action list → JSON {owner, due\_date YYYY-MM-DD, action} → metric: missing owner/dates



# Brainstorming: Workflow Teardown

Identifying Input → Process → Output in everyday tasks

*Do: describe the work as it happens. Be concrete.*

*Don't: list tool brand names or wish-lists. Keep to current workflow.*

# Using AI to Effectively Create Value In Your Job

1

**Capture:** use inputs you already have and can use (docs, CSVs, tickets, emails).

2

**Normalize the inputs and outputs:** use one template, make sure fields are fixed, redacting all the sensitive info.

3

**Transform:** draft / summarise / extract / classify to a fixed output shape.

4

**Check:** length caps, required fields, allowed values.

5

**Deliver:** transfer to where the rest of the task/work happens after using AI (sheet, ticket, email draft).

# Picking the right pilot task

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## Do

- Start narrow: one template for only one team and do it for two weeks.
- Make sure that it has a clear input and decided output shape.
- Decide what should be the primary quality lever it is: speed / quality / throughput / consistency.
- Name the consumer of the end product.
- Set 2–3 metrics with a baseline this week.

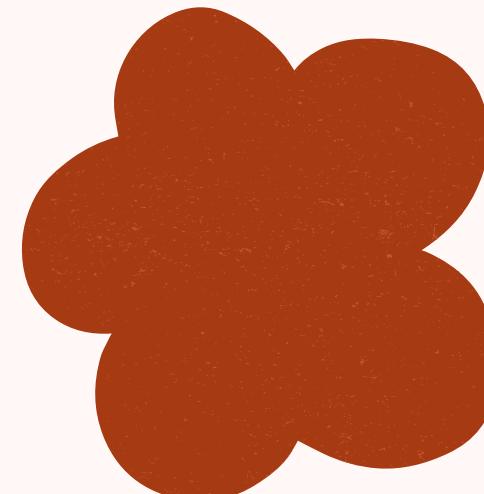
## Avoid

- Fully automating it on day one.
- People decisions, legal wording, or money/access outcomes.
- Vague inputs or finding the data to use for it later
- Outputs no one owns, as that would not be trackable or useful.

# Workshop time: Finding your pilot task

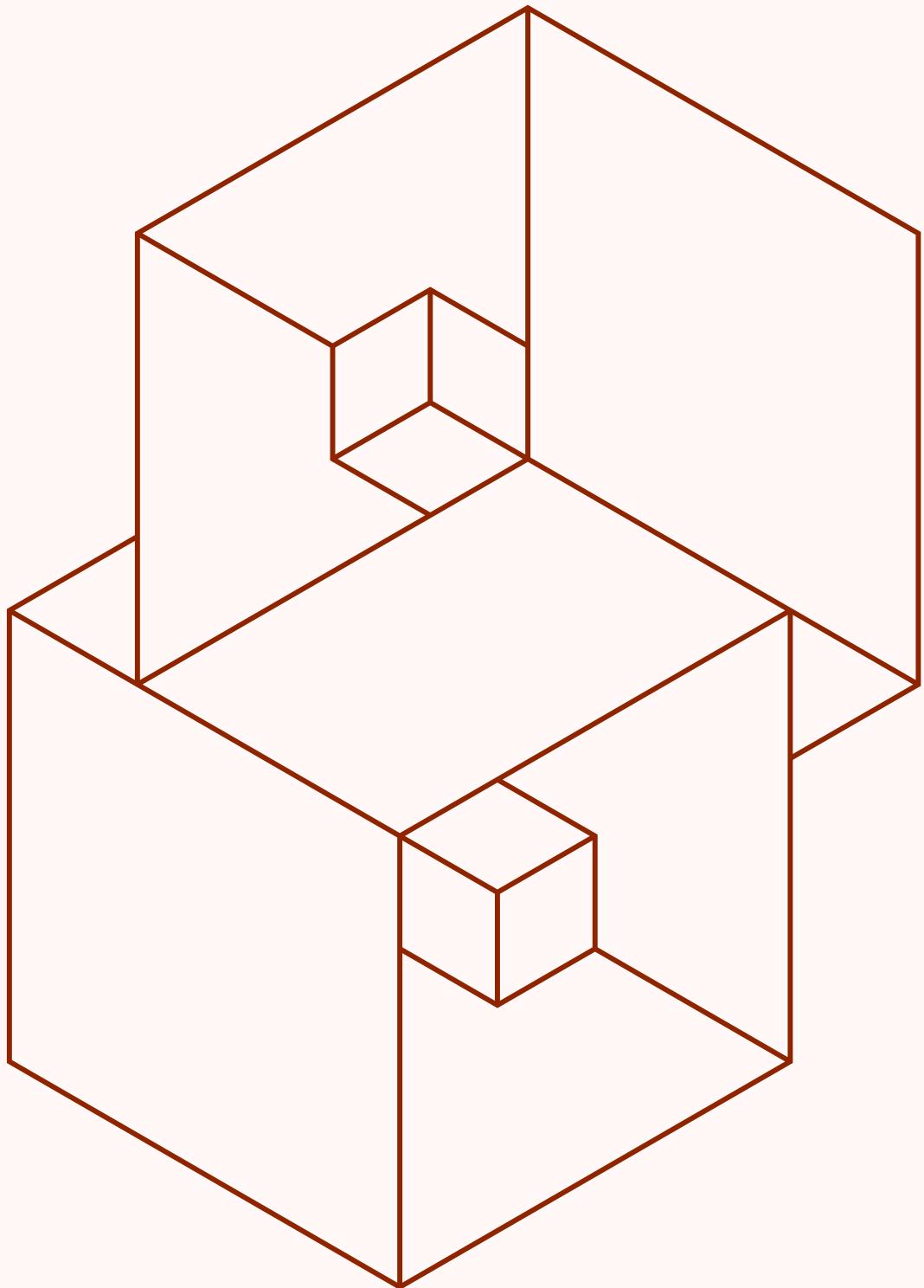


## 1. Input Readiness + Risk Check



- 
- List the actual inputs you can access this week (docs, CSVs, tickets, emails, forms).
  - For each, record think of the: Link, Owner of the output, Format (PDF/CSV/text), is it safe? (Y/N), Whether to redact things? (Y/N)
  - Standardise now: one template for the pilot task.
  - Make sure to get rid of the potential blockers before actually starting: missing access, wrong format, privacy/consent issues.
-

## Workshop: Finding your pilot task



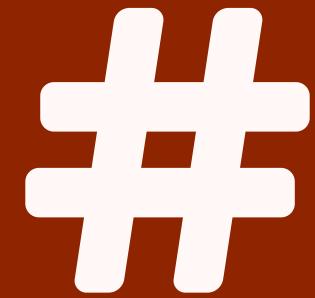
## 2. Output Spec + Handoff

- Pick one format: JSON / table / 3–5 bullets.
- Define fields and exact order. Add length caps and allowed values.
- Set numbers/dates format (e.g., AUD, YYYY-MM-DD).
- Name the consumer and where it lands at the end (sheet, ticket, draft email).
- If no one uses it tomorrow, it's not a useful and ready pilot task

## 3. Metrics + Baseline (prove value fast)



Choose 2–3 metrics:  
minutes per item, error  
rework %, completion  
rate, stakeholder  
approval.



**Baseline this week with  
5–10 manual items;  
write the number.**



Set a 2-week target  
(e.g., time –30%,  
rework –20%).



**Decide how you'll  
measure: timer, sample  
review, simple tally.**

# 4. One-page pilot plan (DRAFT)

- Name + one-liner: “Draft X from Y for Z audience.”
- Scope in / out (keep narrow).
- Inputs: asset list + locations + redaction status.
- Output shape: format, fields, caps, allowed values, consumer.
- Metrics: 2–3 ones spoken about and 2-week targets.
- Guardrails: redaction, approved tool, reviewer, AI when to use triggers.
- Timeline (14 days): baseline → small run → adjust → larger run → review.
- Go/No-Go criteria: targets met, errors < threshold, consumer confirms usefulness.

# Homework



- Collect 5 real inputs for your pilot. Redact the sensitive data. Save to your folder.
- Finalise the output that you want: format, fields (order), caps, allowed values.
- Name consumer and reviewer. Book a 10-min check-in date with them to review it.
- Write guardrails and not using AI triggers for this pilot.
- List 3 likely failure cases to fix in Session 4.
- **Prompting patterns for the pilot will be covered in the next session!**

# Post Quiz

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*This quiz is to see your learning progress over this session*



## Post Quiz - Question 1

**WHICH PILOT STATEMENT IS CORRECTLY SCOPED TO ENSURE IT WILL WORK EFFECTIVELY?**

- A) “Draft X from Y for Z audience”
- B) “Automate finance”
- C) “Replace three teams with AI”
- D) “Try a few ideas and see”



## Post Quiz - Question 1

**WHICH PILOT STATEMENT IS CORRECTLY SCOPED  
TO ENSURE IT WILL WORK EFFECTIVELY?**

- A) “Draft X from Y for Z audience”



## Post Quiz - Question 3

**YOUR SPEC SAYS: FORMAT JSON;  
FIELDS: TITLE, SUMMARY≤120W, ACTIONS[]≤6W, STATUS;  
CONSUMER: TEAM LEAD.  
WHAT IS MISSING?**

- A) Emojis allowed
- B) Bigger word limits
- C) Allowed values for status
- D) A second consumer

## Post Quiz - Question 3

**YOUR SPEC SAYS: FORMAT JSON;  
FIELDS: TITLE, SUMMARY≤120W, ACTIONS[]≤6W, STATUS;  
CONSUMER: TEAM LEAD.  
WHAT IS MISSING?**

- C) Allowed values for status

## Post Quiz - Question 4

**INPUTS TABLE SHOWS A KEY ASSET IS A PRIVATE PDF YOU CANNOT ACCESS AND IT NEEDS REDACTION. BEST NEXT MOVE?**

- A) Start the pilot and hope access arrives
- B) Switch to a public sample from the web
- C) Fix access and redaction, or standardise a safe CSV source first
- D) Drop the asset column from the output



## Post Quiz - Question 4

**INPUTS TABLE SHOWS A KEY ASSET IS A PRIVATE PDF YOU CANNOT ACCESS AND IT NEEDS REDACTION. BEST NEXT MOVE?**

- C) Fix access and redaction, or standardise a safe CSV source first



## Post Quiz - Question 5

**IF YOU WERE TO MAKE A VALUE VS EASE GRID, WHICH DO YOU PICK FIRST?**

- A) High value, high ease, low risk
- B) Low value, high ease, high risk
- C) High value, hard, people/legal risk
- D) Low value, hard, unknown consumer

## Post Quiz - Question 5

**IF YOU WERE TO MAKE A VALUE VS EASE GRID, WHICH DO YOU PICK FIRST?**

- A) High value, high ease, low risk



## Post Quiz - Question 6

**YOUR TEST RUN RETURNS THE WRONG  
FORMAT AND EXTRA FIELDS. NEXT STEP?**

- A) Ask for a longer essay
- B) Tweak the output spec (fields/order/caps/allowed values)  
and rerun
- C) Add advanced prompting patterns now
- D) Accept the output and move on



## Post Quiz - Question 6

**YOUR TEST RUN RETURNS THE WRONG  
FORMAT AND EXTRA FIELDS. NEXT STEP?**

- B) Tweak the output spec (fields/order/caps/allowed values)  
and rerun



# Next Steps

## **SESSION 4**

Prompting Fundamentals

## **SESSION 5**

Operationalising With Workflows