



and



AI Learning Lab

**Session 2 - Leveling Up – Custom AI
Tools, Research and Analysis**

November 7, 2025

Your Feedback Matters

WPTI AI Training Dashboard Session 1

Executive View Learner View

WPTI AI Training Workshop - Executive Summary

Session 1: AI Basics & Workforce Disruption | October 31, 2025 | New York City

30 Participants Data Collected & Analyzed

Key Findings

↗ 67%
67% Daily AI Users
Two-thirds of workforce professionals use AI every single day

⚠ 73%
Data Security Crisis
73% using personal accounts, exposing sensitive participant data

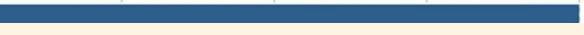
⚡ 27%
Adaptation Over Automation
Top concern is adaptation speed (27%), not job loss (7%)

❤️ 1.3:1
Cautious Optimism
Positive-to-negative sentiment ratio of 1.3:1

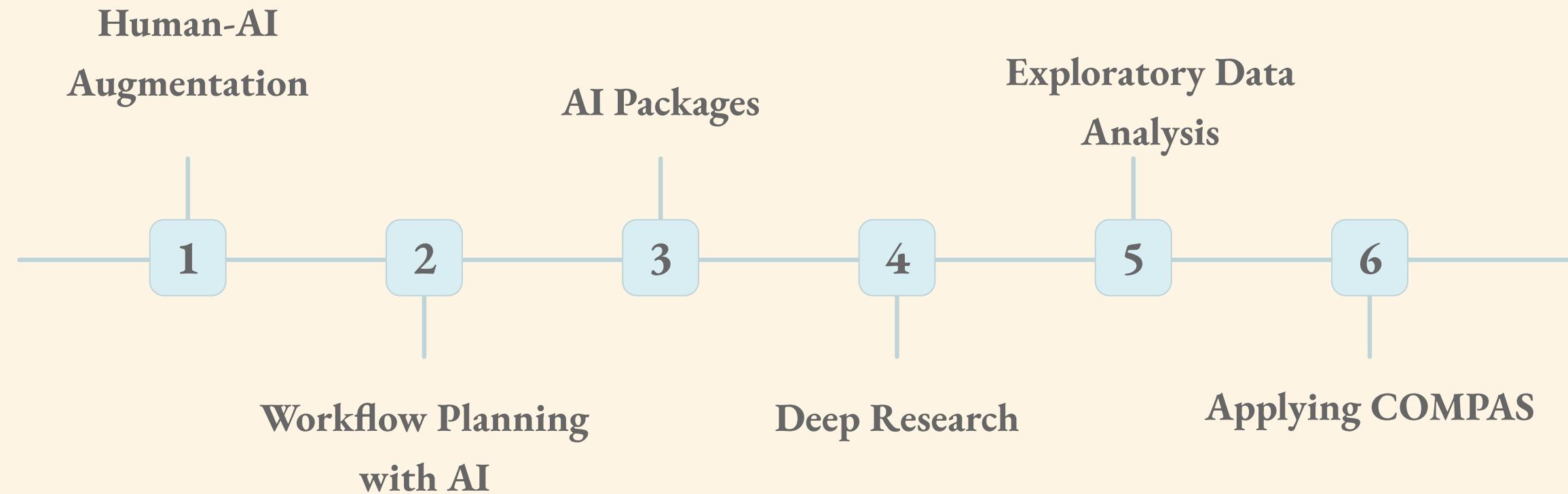
⌚ 6
Platform Fragmentation
6 different AI platforms across organizations

📋 45%
Organizational Concerns Dominate
20 organizational issues captured - nearly half of all concerns

AI Usage Frequency
20% 

Top Concerns About AI Impact
They won't be able 

Today's Journey





Human-AI Augmentation Framework

Your Expertise + AI's Processing Power



Do More of What Matters

Spend less time on administrative tasks and more time supporting participants and building employer partnerships



Reach More People

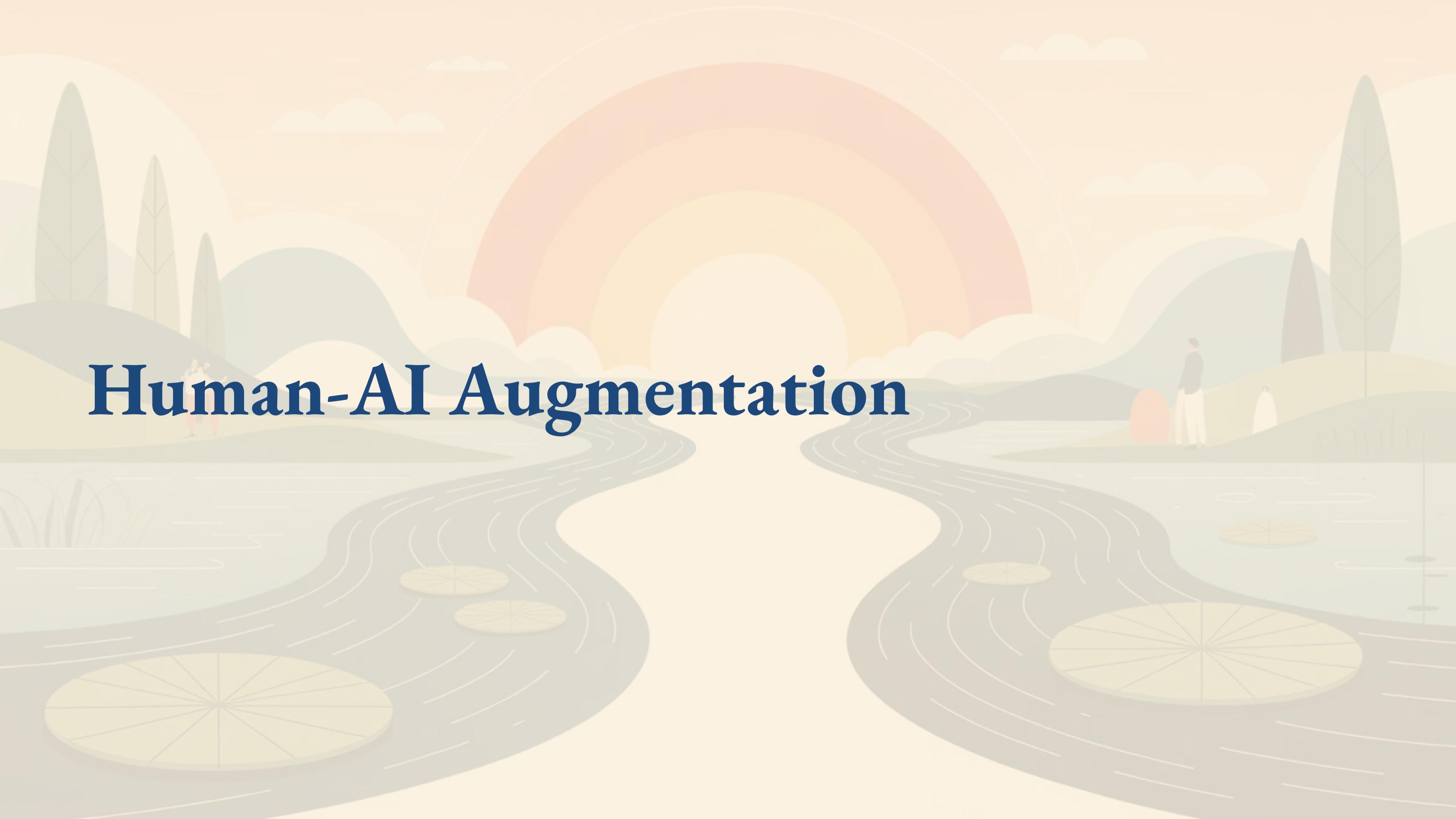
Serve more participants with the same staff resources by streamlining routine processes



Elevate Your Work

Create higher quality outputs—from reports to communications—in a fraction of the time

Human-AI Augmentation



Your expertise + AI's processing power



Do more of what matters most

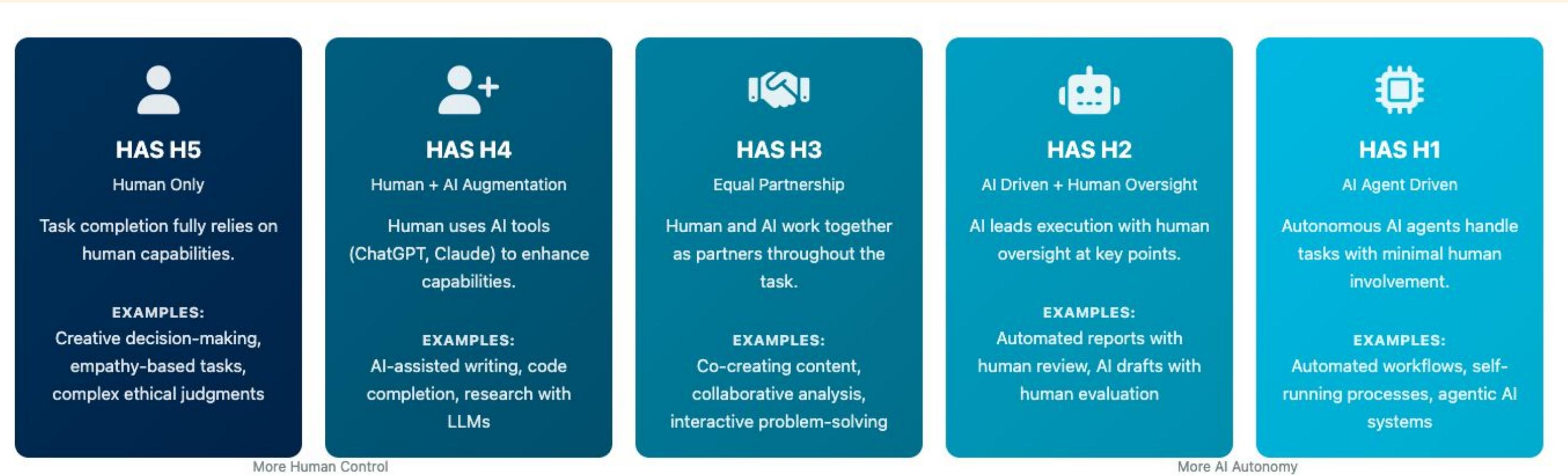


Reach more people with the same effort



Create higher quality outputs in less time

Human-AI Augmentation Continuum



Human Capabilities

Shifts from sole reliance to collaborative enhancement

AI Role

Evolves from tool to partner to autonomous agent

Task Completion

Progresses from manual to augmented to automated

Where Do These Scenarios Fall?

1

Resume Screening

AI screens all resumes and makes final hiring recommendations

AI flags relevant experience and skills, but you evaluate cultural fit and potential

2

Participant Communication

AI writes and sends follow-up emails automatically

AI drafts personalized emails that you review, adjust for tone, and send

3

Program Data Analysis

AI generates complete program reports with recommendations

AI identifies patterns and trends that you interpret with your program knowledge

Much of our work is here

Level H4: AI Augmentation

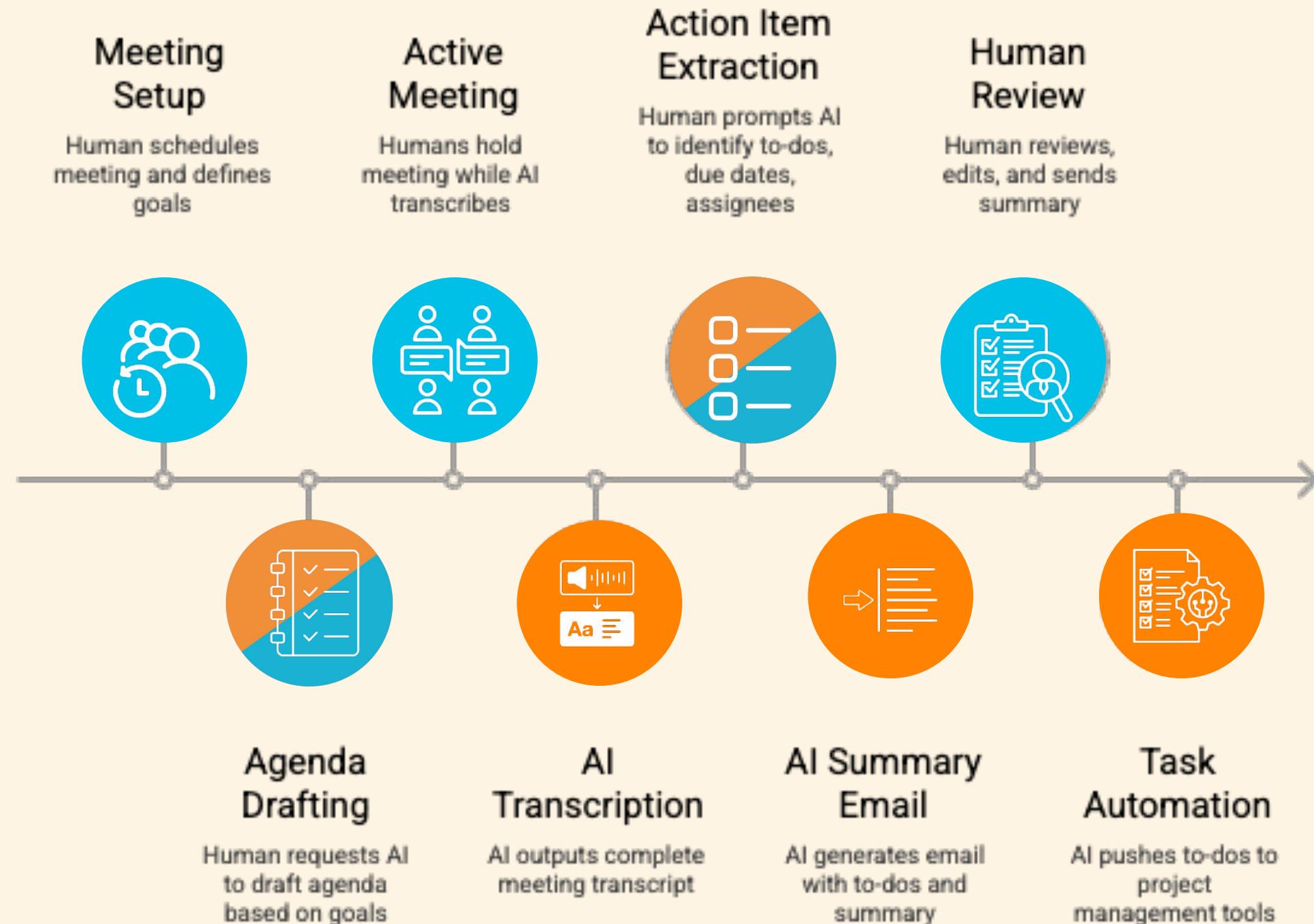
AI drafts meeting notes from your recordings, but you review and personalize them before sending. AI suggests job matches for participants, but you evaluate fit and make the introduction.

Level H3: Equal Partnership

AI analyzes program data and you interpret the findings together. AI helps structure a grant proposal while you provide the narrative and context about your participants' stories.

Remember: most of your work with AI will happen in the middle of the spectrum—where you maintain control and judgment while AI handles the heavy lifting.

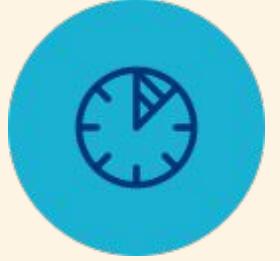
It can also be highly collaborative



Workflow Planning



Brainstorm



What types of workflows in your work
lives are candidates for AI
augmentation?

Before You Build: Know Your Resources

Just like cooking, you need to know what ingredients you have before you start. For AI-augmented workflows, take inventory:



Your Documents & Data

- Transcripts and notes
- Templates you use repeatedly
- Forms and assessments
- Past reports or examples
- Program data or outcomes



Your AI Tools

- What platforms do you (and your team) have access to?
- ChatGPT, Claude, Gemini, Copilot, Google Workspace AI, Microsoft 365 Copilot

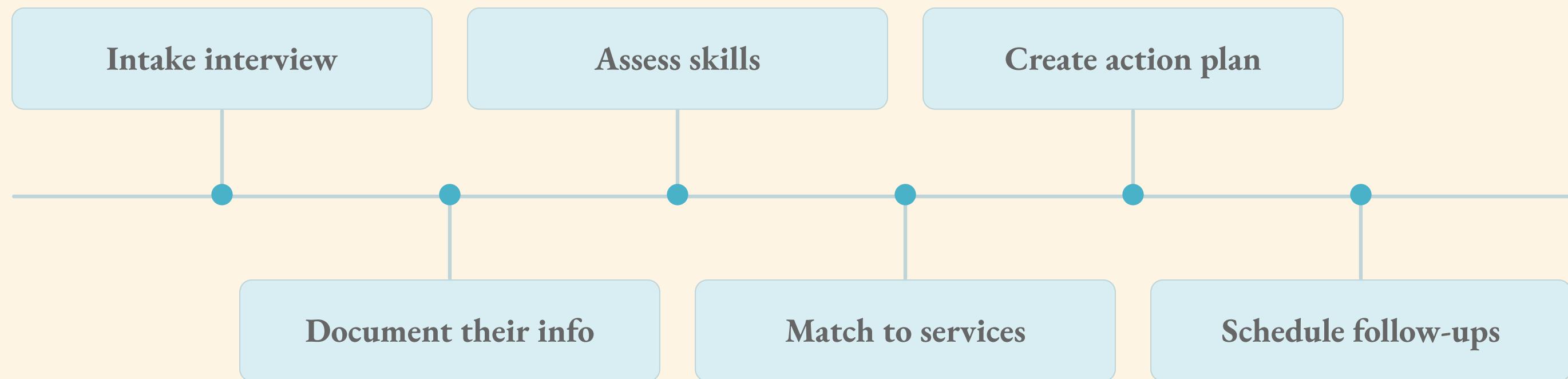


Your Context

- What do people need to know to do this work well?
- What's your organization's voice and approach?
- What are the non-negotiables (privacy, equity considerations)?

Break down jobs into process steps

Example: Onboarding a new participant



Each step is different. Some need human judgment. Some AI can help with. Understanding the whole workflow helps you see where AI fits.

And yes, we've got
a prompt for that!

ChatGPT App
<https://tinyurl.com/workflow-gpt>

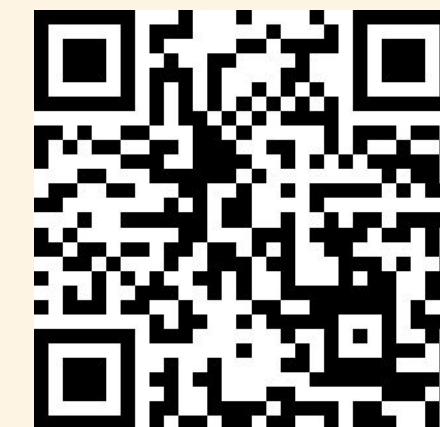


AI Workflow Planner



Workflow Prompt

<https://tinyurl.com/workflow-prompt>



AI Packages and Projects



AI Capabilities Continuum

Example: Working with Meeting Transcripts

1



Simple Prompt

Basic, one-time request

"Summarize this meeting transcript"

2



Structured Prompt

Fully developed CRAFT prompt

Context, Role, Action, Format, Target audience

3



AI Packages and Projects

Saved, reusable configuration

Meeting Task Extractor in Gemini Gems

4



Automation

Semi or fully automated workflow

Send email summaries, log tasks to Asana (Zapier/Make)

Ingredients for AI Packages



Your AI Package Ingredients

1

Clear Instructions

Well-crafted prompts that guide the AI's behavior and responses

2

Supporting Knowledge

Documents, examples, and context that inform the AI's understanding



Mix together for a powerful, reusable AI assistant

GPT's, Projects: What's the Difference?



Custom AI Assistants

ChatGPT, Gems, Copilot Agents

- Contain specialized instructions and files
- Provide specific skill sets
- Built for a focused task or area
- Shared or published for others to use



AI Projects

Claude, ChatGPT

- Tailored with specific instructions and files
- Houses documents and knowledge sources as context
- Workspace for grouping chats together
- Sharing allowed only within workspace

Two approaches to structured, repeatable AI work



ChatGPT GPTs / Gemini Gems / Copilot Agents

- ✓ Custom AI assistants, easy setup
- ✓ Shareable and reusable across contexts
- ✓ Extend with files and examples

Best For:
Ongoing conversational use



Microsoft
Copilot



ChatGPT



Gemini



ChatGPT / Claude Projects

- ✓ Workspace for structured AI tasks
- ✓ Organize prompts, files, instructions
- ✓ Supports iteration and collaboration

Best For:
Developing and associating related work



ChatGPT



Claude

Platform Overview

Different AI platforms use different names, but they're all creating the same thing: reusable AI assistants customized for your specific tasks.



ChatGPT

Custom GPTs: Task-focused assistants

Projects: Workspaces for ongoing work



Claude

Projects: Document-heavy workspaces with strong context management



Gemini

Gems: Specialized assistants for repeated tasks

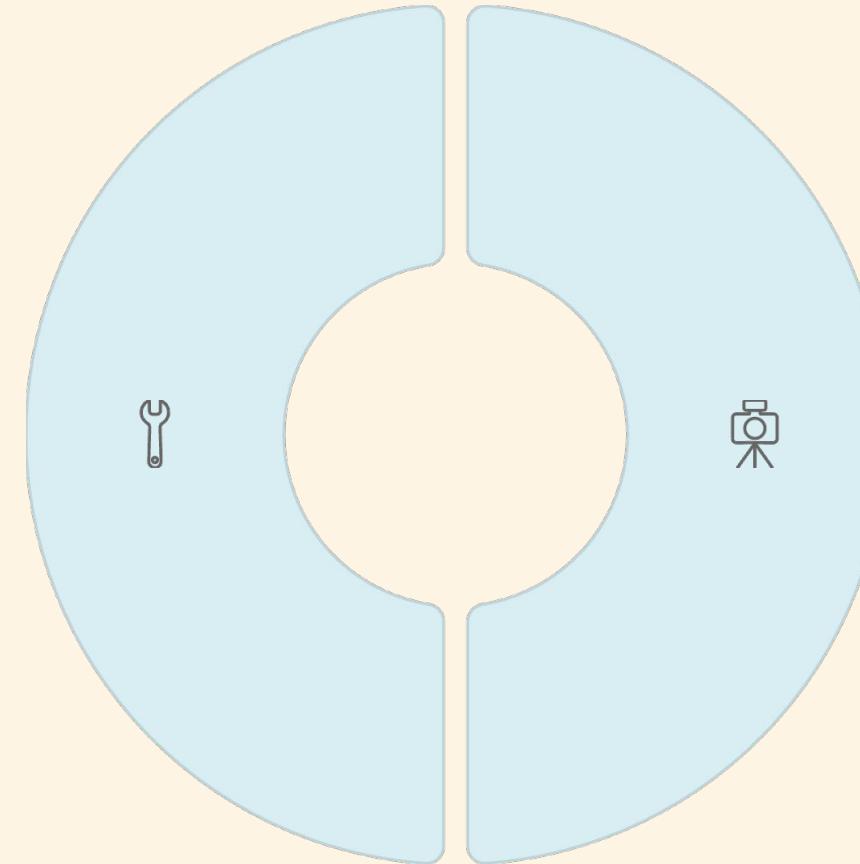


Microsoft Copilot

Agents: Custom assistants integrated with Microsoft 365

The concept is the same across platforms—you're creating specialized assistants that know how you work and what you need.

Platform Comparison



- Easy to set up and share
- Perfect for repeated tasks
- Task-focused and reusable

Projects

ChatGPT Projects, Claude Projects

- Organize prompts, files, instructions
- Context builds over conversations
- Best for ongoing, complex work

Don't worry about making the "perfect" choice. You can use both approaches for different tasks. Today we'll focus on building custom assistants since they're great for workforce development tasks.

From Structured Prompt to AI Package

Building an AI package is a systematic process. Let's walk through the steps you'll follow today.

01

Start with Structure

Begin with a well-crafted CRAFT prompt that works

02

Test and Refine

Try your prompt with real examples and improve it

03

Convert to Package

Transform your prompt into the AI package format

04

Add Support Materials

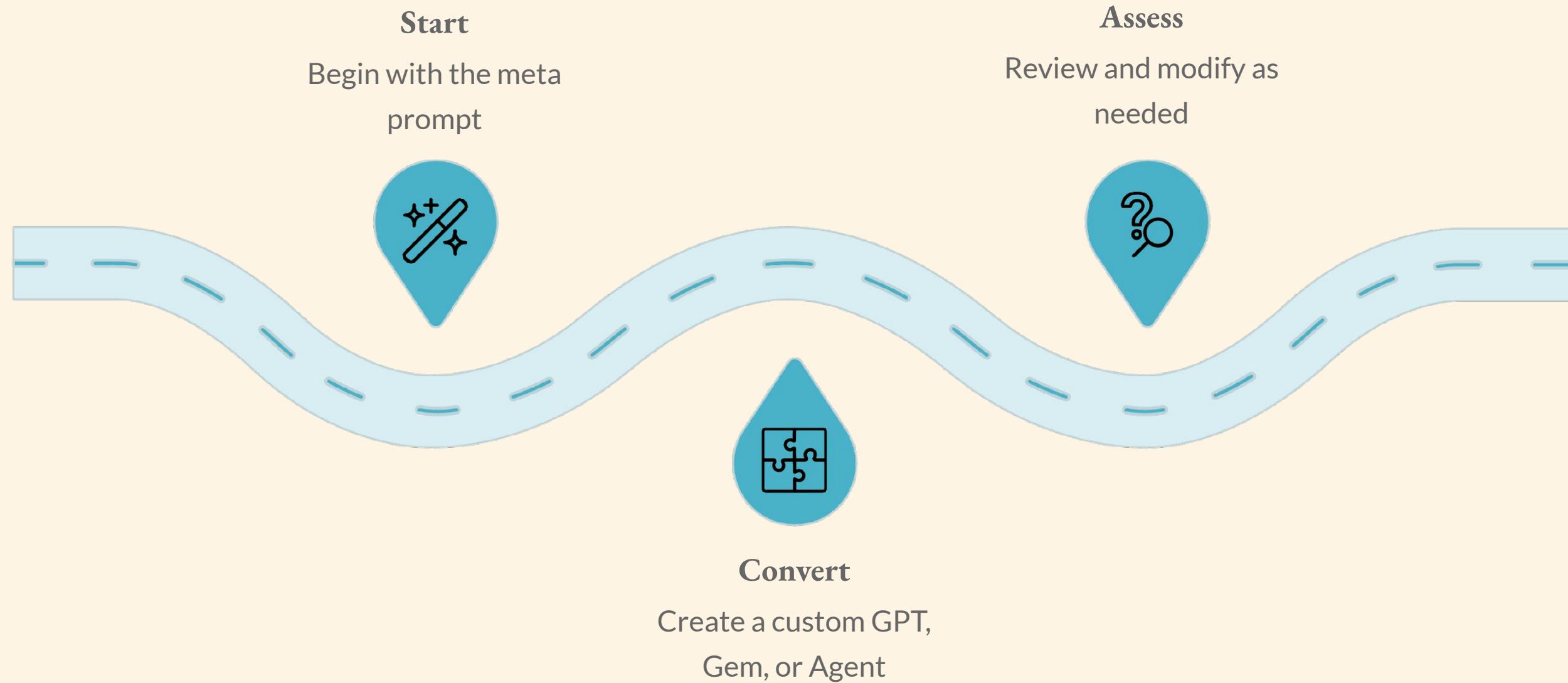
Include example documents or templates

05

Test with Real Scenarios

Use it with actual work situations and refine further

Demo Walkthrough Steps



Live Demo

Meeting Notes Analyzer GPT

If you want to make a prompt improver GPT, Gem or Agent

Metaprompt Instructions:

<https://tinyurl.com/meta-prompt>



Choosing Your AI Tool Type

Understanding the distinction between these AI tool types will help you select the most effective solution for your current task.



Assistant Types (Custom GPTs, Gemini Gems, Agents)

- Best for repeated, well-defined tasks
- Consistent inputs and outputs
- Ideal for Option 1 (Meeting Notes Analyzer)
- Consider for Option 2 (Workflow Tool) if workflow is highly structured



Project Workspaces (Claude, ChatGPT Projects)

- Suited for complex, multi-step, exploratory tasks
- Requires ongoing interaction
- Not recommended for Option 1 (straightforward tasks)
- Strong choice for Option 2 (Workflow Tool) with dynamic inputs or decision-making

Meeting Notes Example

Everything you need is provided. Focus on building and testing—don't worry about starting from scratch.



Meta-Prompt Template

Structured guide for creating your prompt



Sample Transcripts

Anonymized meeting notes for testing



10 Minutes Build Time

Focused work with circulation support

AI Package Showcase

Showcase Your AI Tool

Briefly demonstrate what you built, highlighting key features and personal learnings.

Share Creations in the Community

Share your AI packages with others. This can include exporting models, sharing code, or showcasing deployed applications.

Deep Research



Deep Research Capabilities

All Major Platforms Can Research

ChatGPT, Gemini, Claude and Copilot all handle:



Multi-source research compilation



Synthesis and analysis



Source citation and linking



Document gathering and review

Deep Research



Comprehensive Synthesis

Analyzes 100+ sources in minutes automatically.



Multi-Perspective Analysis

Compares viewpoints and evaluates source credibility.



Iterative Investigation

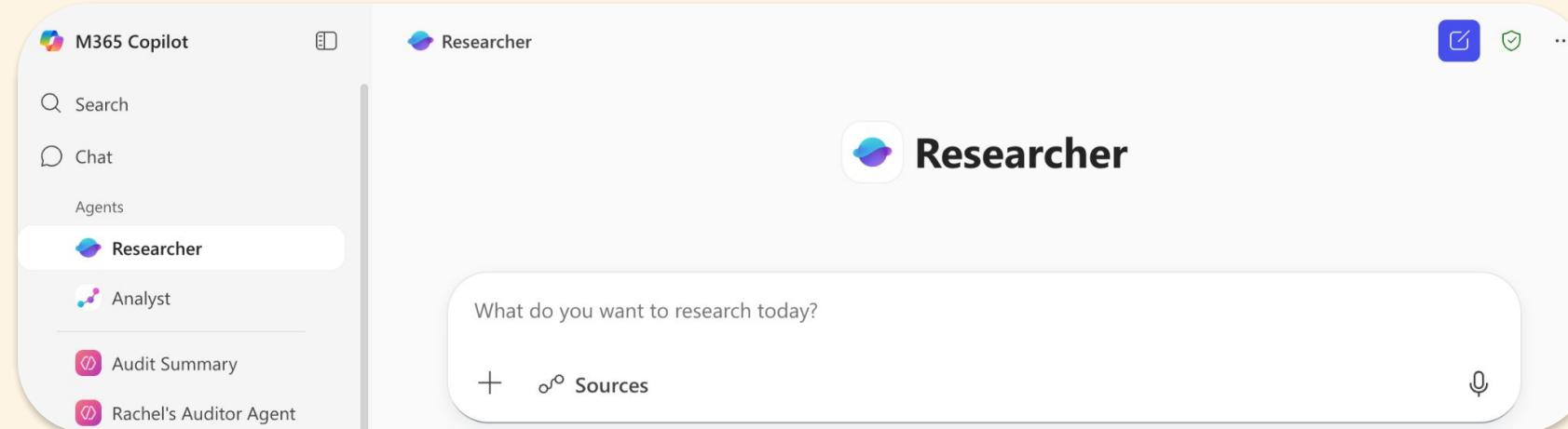
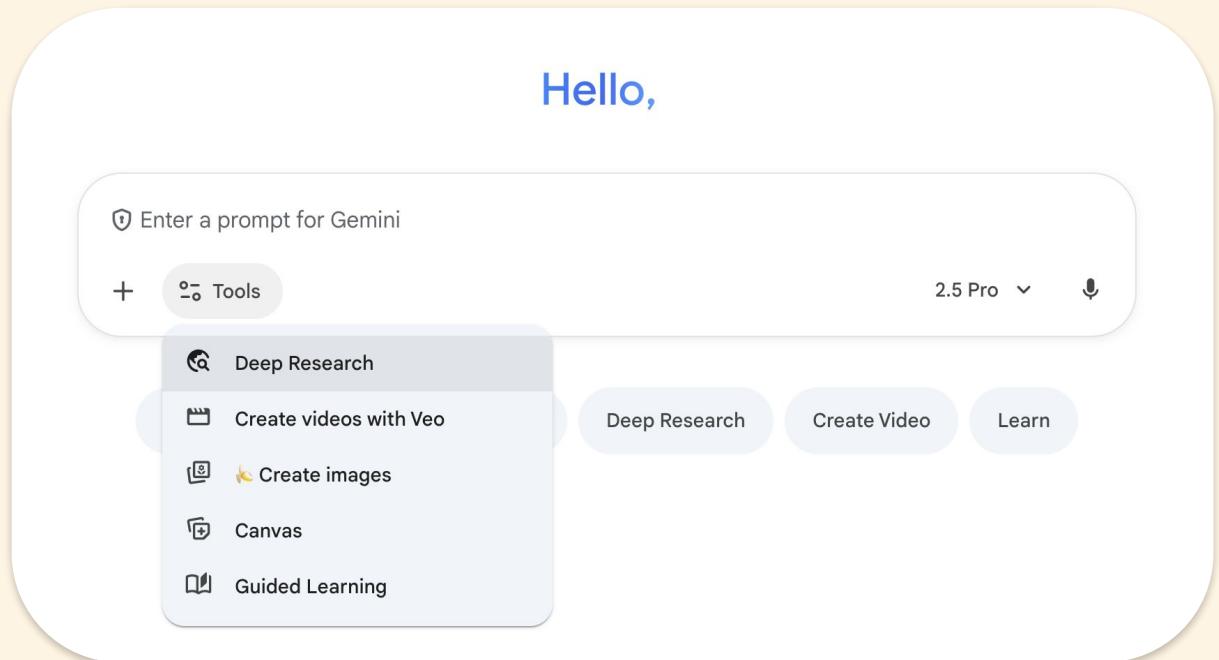
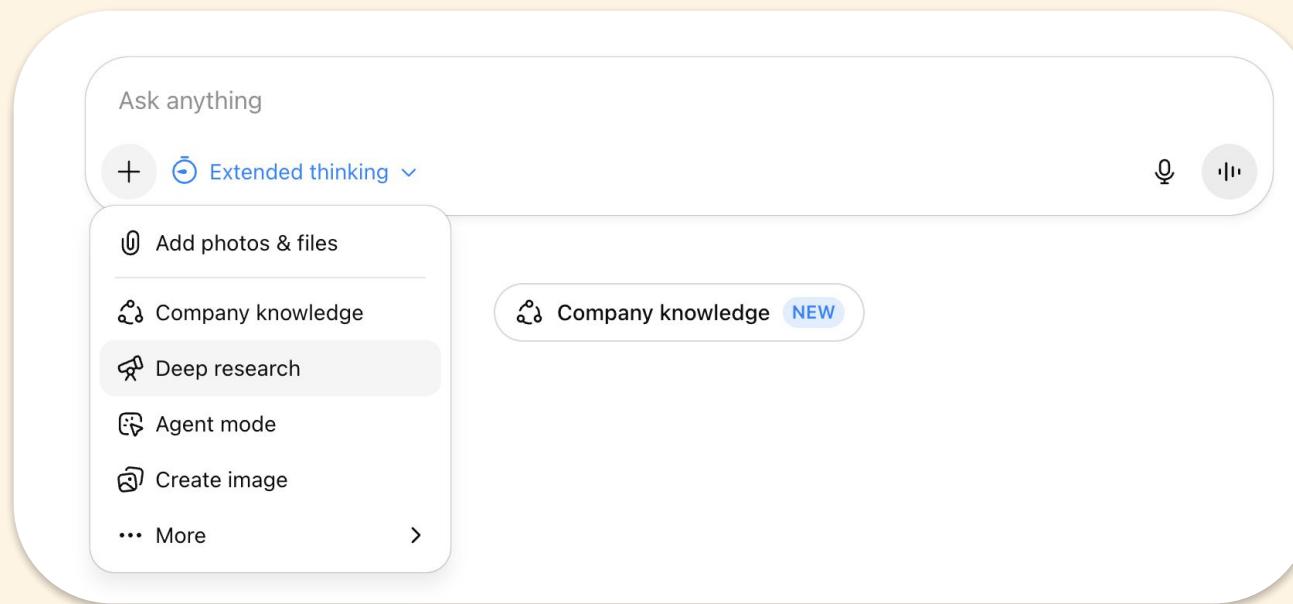
Uses reasoning to follow inquiry threads for deeper insights.

Then...



Now!

How do you do deep research?



Your Turn to Explore

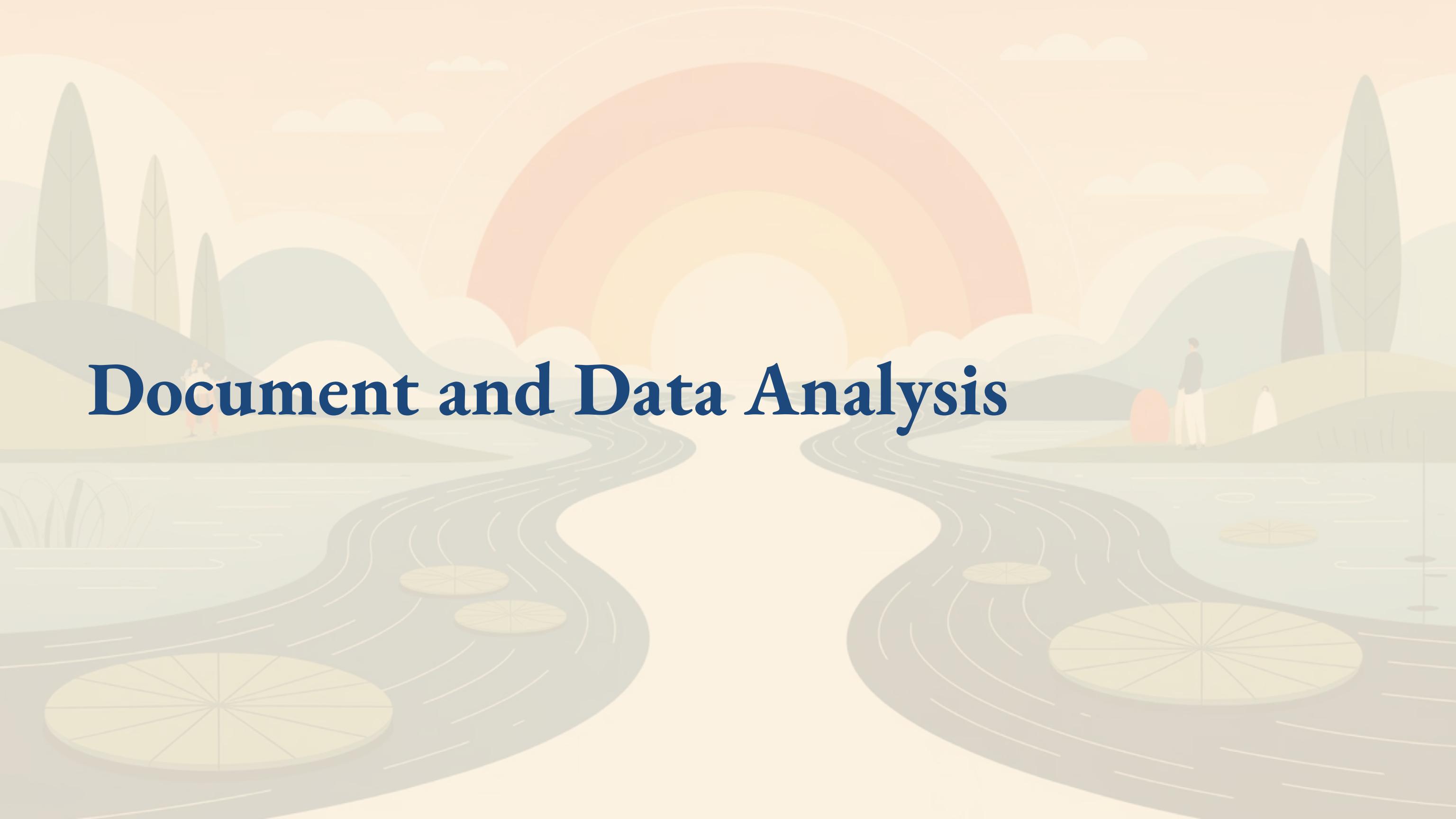
Pick a research topic

Drawing Prompt Challenge



How are those research projects?

Document and Data Analysis



Google NotebookLM / Copilot Notebook

AI-powered research and note-taking assistant



Summarizes and answers questions from numerous sources.



Generates audio and video summaries of your sources.



Gains insights from information and surfaces lost details in minutes.



Organizes and structures complex research projects efficiently.

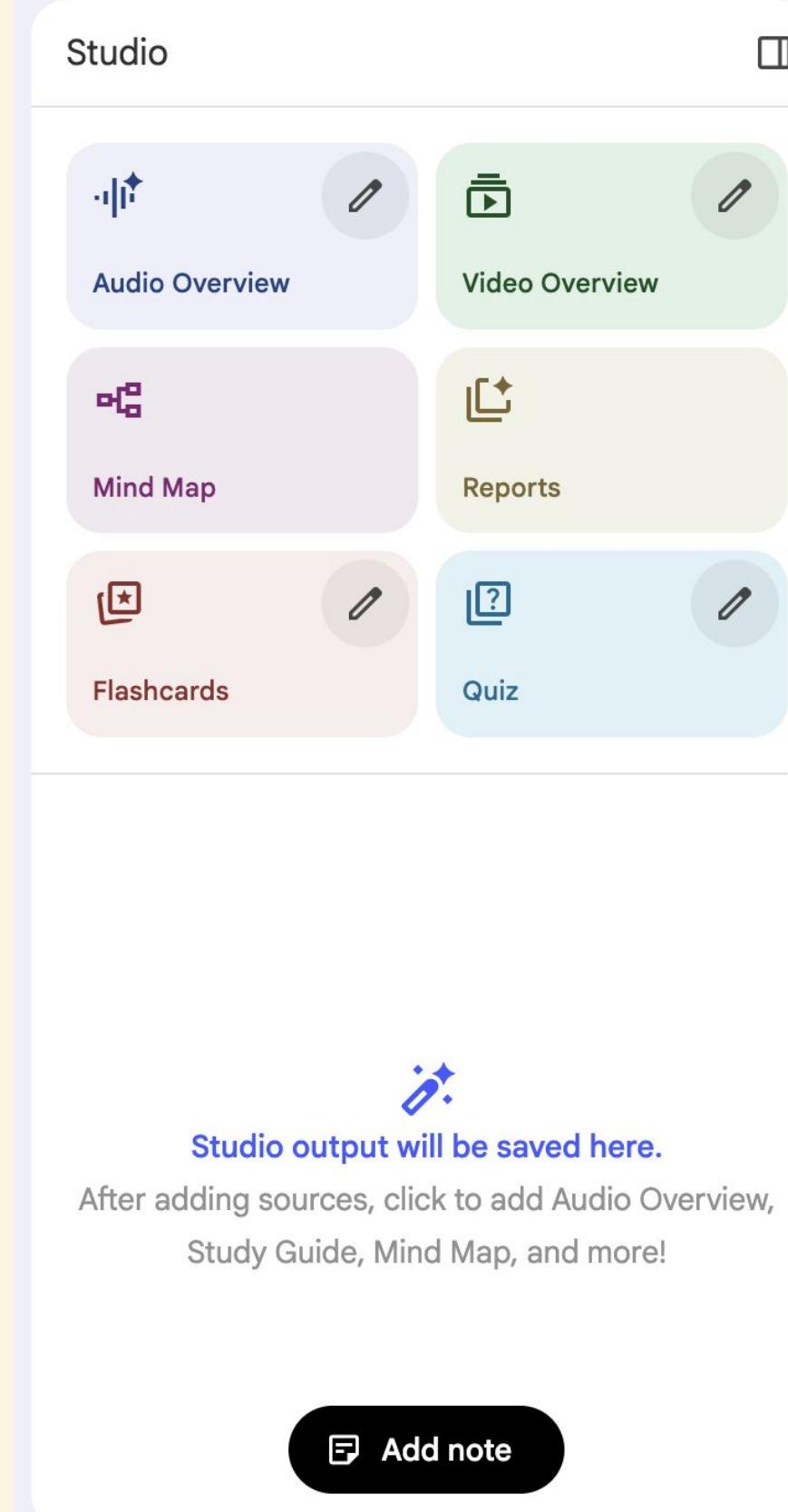
Live Demo

Google NotebookLM

NotebookLM's Unique Features

Enhance understanding with Studio

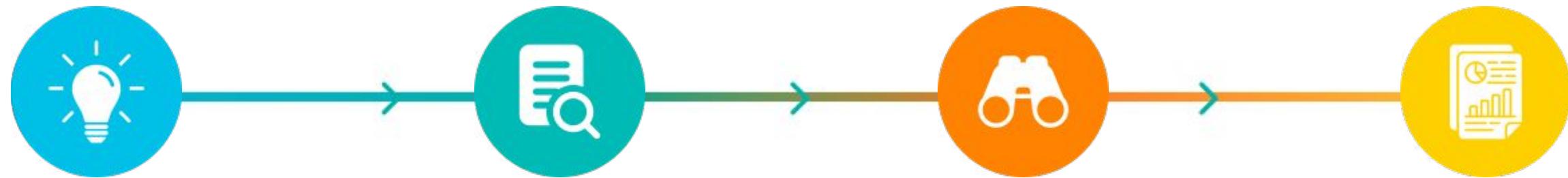
- Creates audio summaries of your sources
- Can generate debates between two AI hosts
- Translates complex information into mind maps
- Helps you absorb information in new ways
- Great for understanding complex documents



Live Demo

Google NotebookLM

Exploratory Data Analysis



Idea

Your question or hypothesis to explore

Deep Research

AI gathers comprehensive information

Exploratory Data Analysis

Uncover patterns and relationships

Findings

- ✓ Reports
- ✓ Visualizations
- ✓ Actionable insights

Live Demo

Exploratory Data Analysis (and prompt!)

Exploratory Data Analysis: Finding Patterns You Didn't Know Were There



What is it?

- Asking your data questions to see what stories emerge
- Looking for patterns without a predetermined hypothesis
- Exploring to understand, not just to prove a point



Why use AI for this?

- AI scans large amounts of data quickly
- Spots patterns that would take humans hours or days
- Helps you ask better questions



Workforce development examples

- "Show me patterns in program completion vs. dropout"
- "What do successful employer partnerships have in common?"
- "What trends exist in participant barriers?"

Your role: Bring context and questions. AI helps you explore faster.

Live Demo

Exploratory data analysis

Why Publicly Available Data Matters

Safe to Experiment

- Publicly available = No PII concerns → Safe to upload and analyze
- Great for learning and testing → No privacy risks

Platform Considerations: A Note on Data Analysis



ChatGPT

Strong data analysis capabilities



Claude

Excellent data analysis and visualization



Gemini

Limited data analysis in Google Sheets (for now)



Copilot

Can now be used in Excel (no cost)

- ❑ These capabilities are evolving rapidly

Structured Prompt for Data Analysis

Take This Template



Structured prompt for exploratory data analysis



Use to create your own data analysis GPT



Data will be available in community



Try this on your own workforce data

Prompt:

<https://tinyurl.com/eda-prompt>



Your Turn to Explore

<https://tinyurl.com/titanic-list>



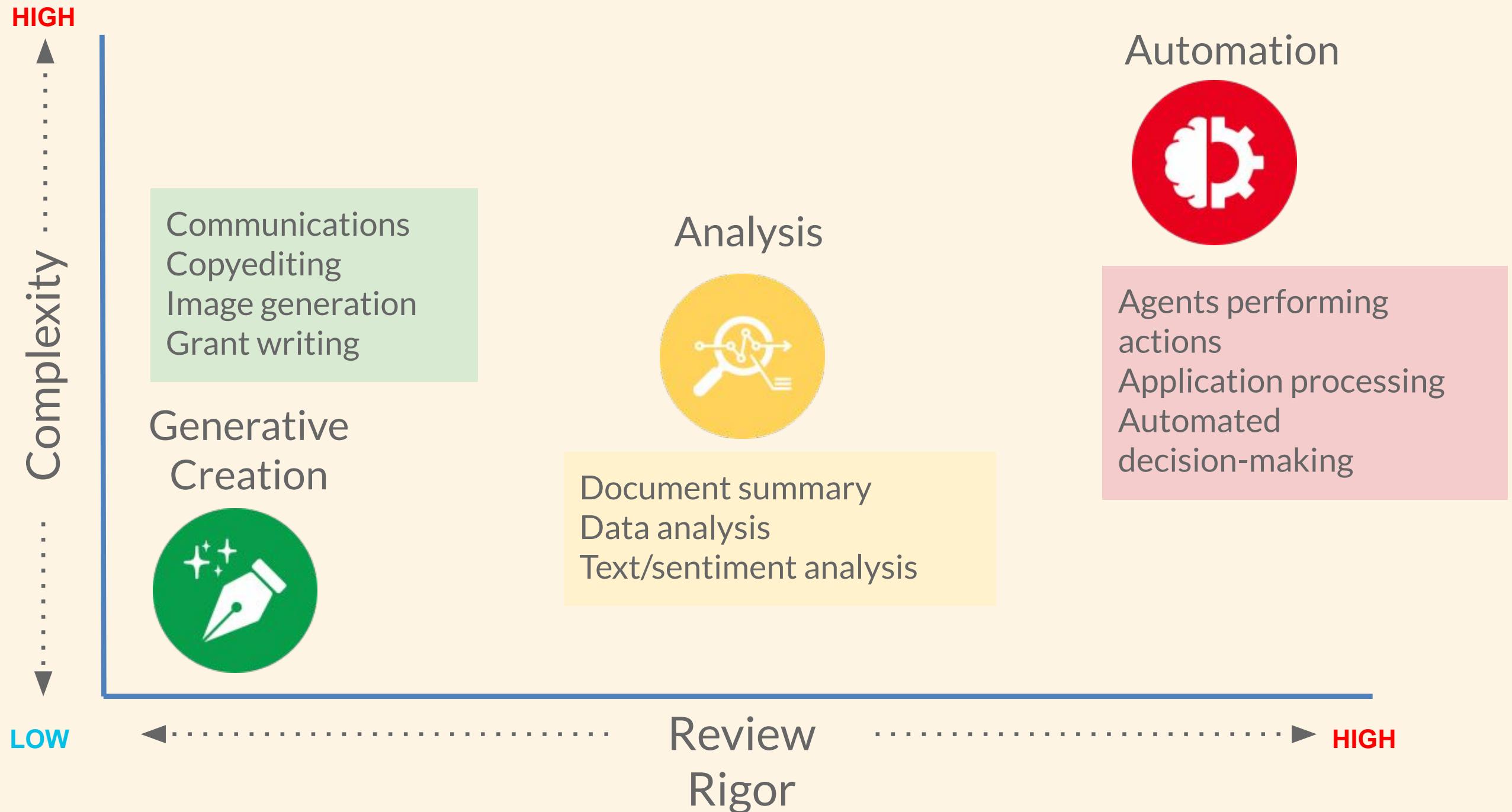
The Critical Step We Can't Skip: Verification

AI can miscalculate, misinterpret, and miss context.

- Calculations can contain mathematical errors
- Visualizations can misrepresent the actual data
- Conclusions can miss critical context only humans know

The more complex the task, the more rigorous the review.

Human-AI Augmentation and Task Complexity



Task Complexity and Required Review



Simple tasks, quick review: Copy editing requires basic accuracy check



Medium tasks, moderate review: Article writing needs fact and tone verification



Complex tasks, rigorous review: Data analysis demands methodology and logic validation



Critical tasks, expert review: Strategic decisions require deep domain expertise

Applying COMPAS



COMPAS

USING AI EFFECTIVELY

How do today's skills and capabilities apply?



Context

understand the situation



Objective

design an approach



Method

design an approach



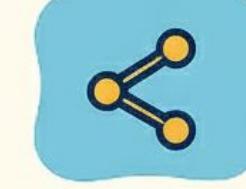
Performance

perform the work



Assessment

review the work



Share

learn and improve



Method



AI Packages

GPTs (ChatGPT Plus)
Projects (Claude Pro)
Gems (Gemini Advanced)
Agents (Microsoft Copilot)



Deep Analysis

Deep research with source citations
Document analysis across multiple files
Audio overviews and summaries
Exploratory data analysis

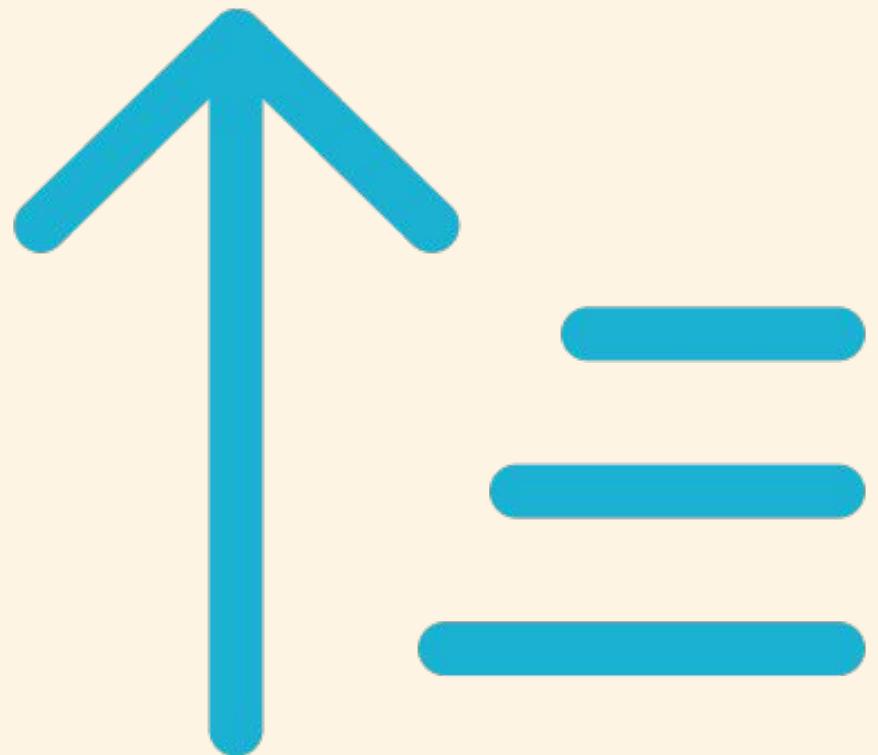


Structured Approaches

CRAFT prompting framework
Iterative refinement
Template creation
Systematic exploration



Performance



Start Small and Build

- Pick ONE workflow to improve this week
- Use it consistently for 5 days
- Notice what works and what doesn't
- Adjust and try again



Assessment

Assess the outputs:

- ✓ Is this accurate and does it align with my expertise?
- ✓ Can I verify sources and reasoning?
- ✓ What needs correction or refinement?

Assess the impact and process:

- ✓ Where did AI actually help vs. where did I still do the work?
- ✓ What time did I save? What quality improved?
- ✓ Did I find the right balance of human-AI interaction?
- ✓ What would I do differently next time?
- ✓ Is this approach worth keeping or should I adjust?

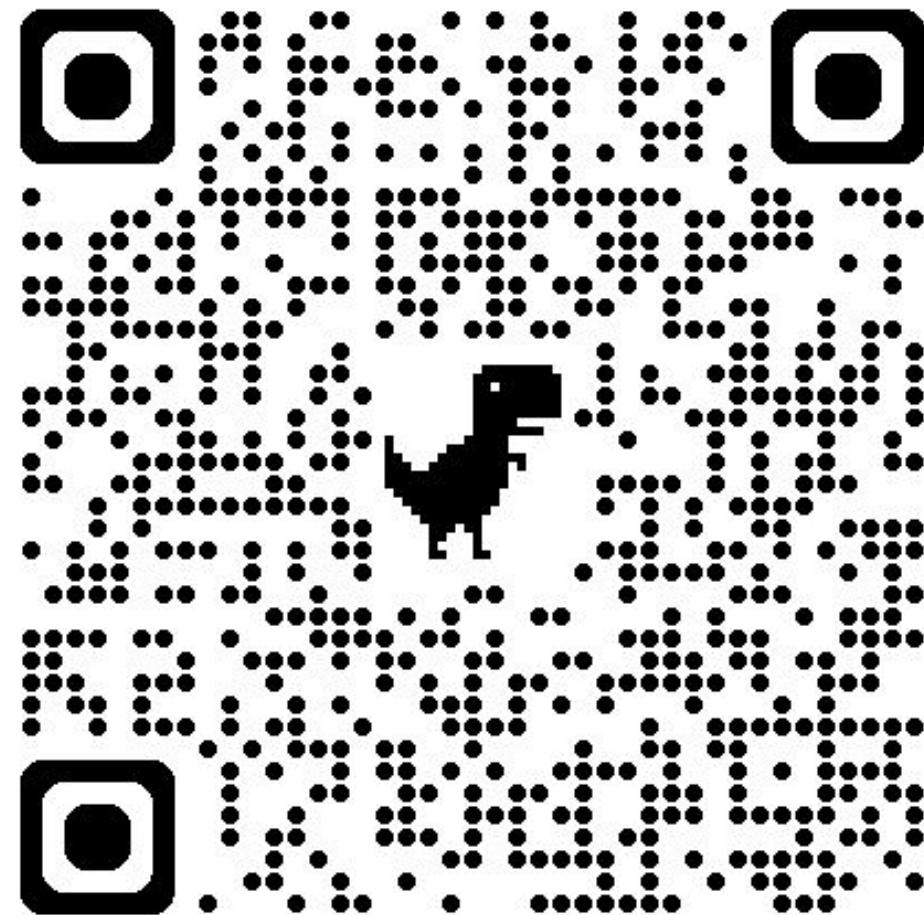
Assessment isn't just verification - it's continuous improvement.



Zombie Apocalypse Readiness Check (ZARC)

By community builder ☺

Nine characteristics to help you determine the value you bring to a Zombie Apocalypse Team and what kind of teammates you will want to survive the Zombie Apocalypse.



Bringing it Back to Your Organization

Bringing this back to your organizations



Create an AI Package

(if you have platform access)

- ChatGPT Plus: Build a Custom GPT/Project
- Claude Pro: Set up a Claude Project
- Gemini Advanced: Create a Gemini Gem
- Microsoft Copilot: Configure a Copilot Agent

Create an AI package and share it with a colleague

Please give us your feedback!



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