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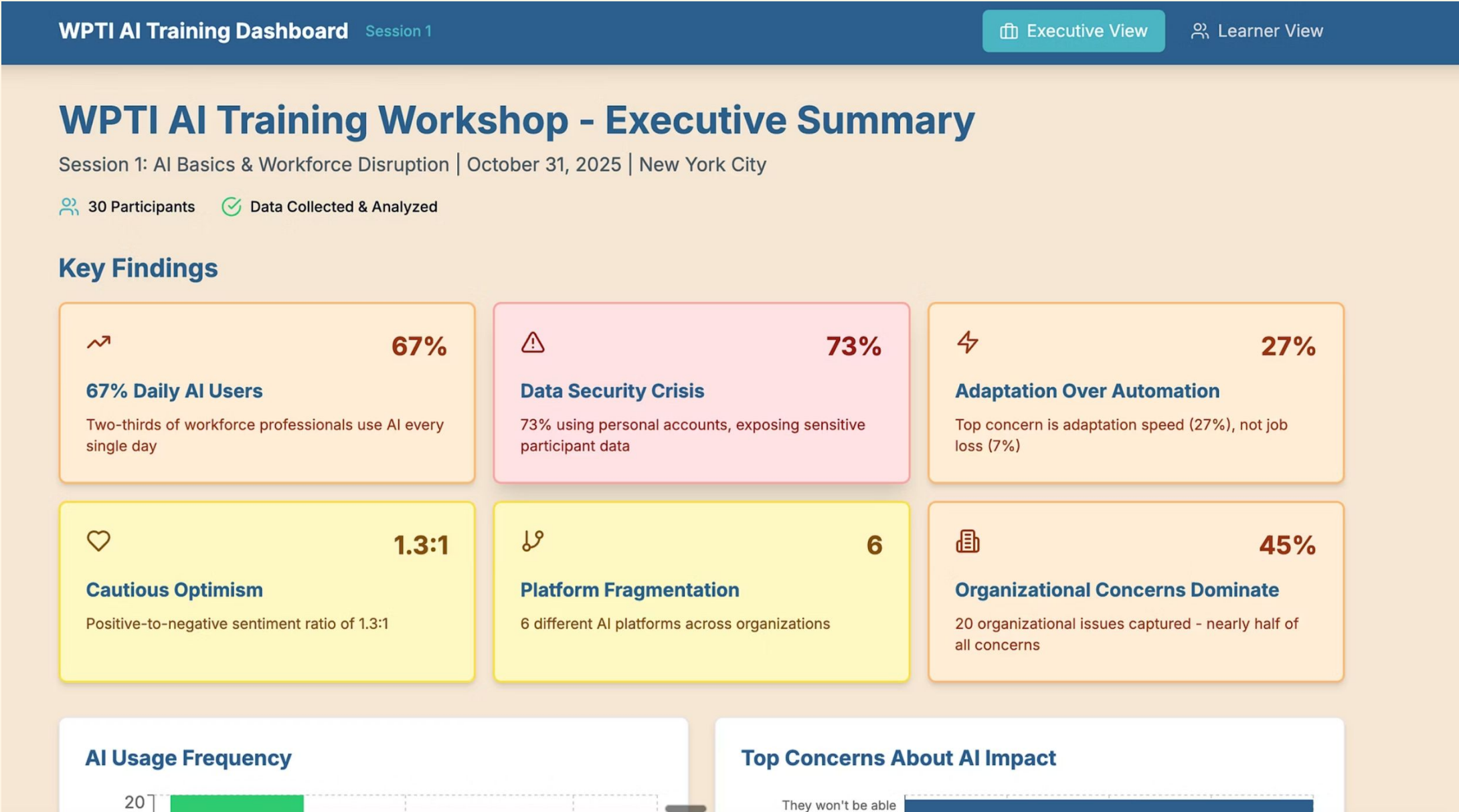


# AI Learning Lab

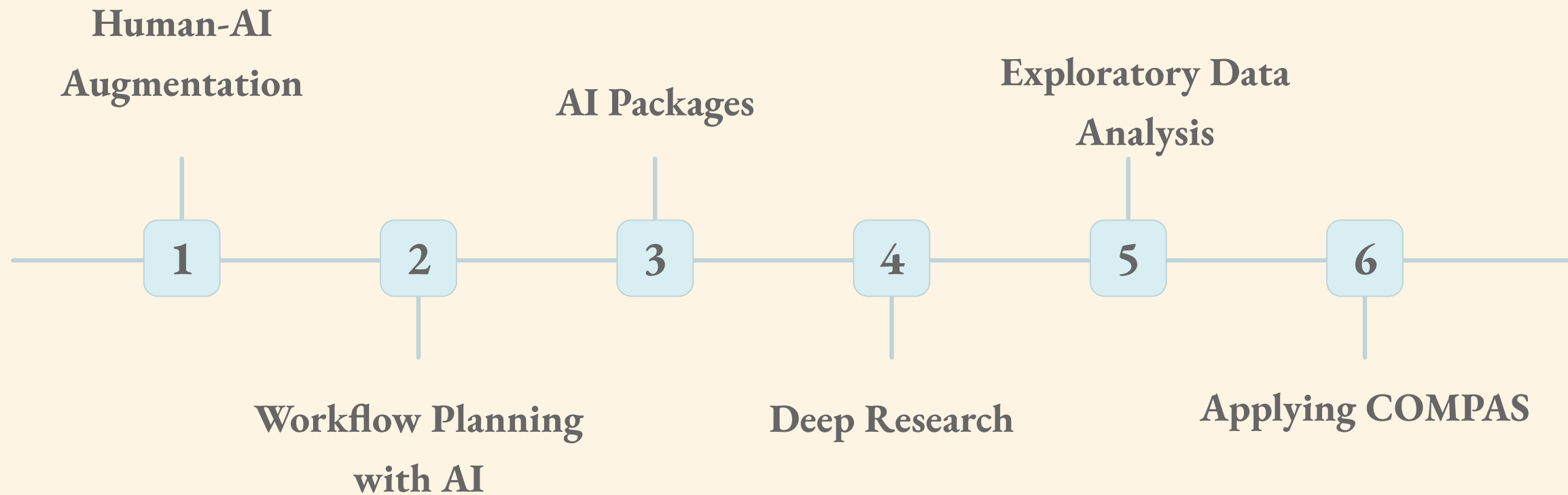
**Session 2** - Leveling Up — Custom AI  
Tools, Research and Analysis

November 7, 2025

# Your Feedback Matters



# 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

A stylized, flat-design illustration of a landscape. A large, multi-colored rainbow arches over a winding river. The river is filled with lily pads and has small ripples. On the left bank, two small figures are walking. On the right bank, a person stands near a large orange rock, and another figure is visible further back. The background features rolling hills and stylized trees. The sky is a warm, light orange color with a few clouds.

# 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



**HAS H5**  
Human Only

Task completion fully relies on human capabilities.

**EXAMPLES:**  
Creative decision-making, empathy-based tasks, complex ethical judgments



**HAS H4**  
Human + AI Augmentation

Human uses AI tools (ChatGPT, Claude) to enhance capabilities.


**EXAMPLES:**  
AI-assisted writing, code completion, research with LLMs



**HAS H3**  
Equal Partnership

Human and AI work together as partners throughout the task.

**EXAMPLES:**  
Co-creating content, collaborative analysis, interactive problem-solving



**HAS H2**  
AI Driven + Human Oversight

AI leads execution with human oversight at key points.

**EXAMPLES:**  
Automated reports with human review, AI drafts with human evaluation



**HAS H1**  
AI Agent Driven

Autonomous AI agents handle tasks with minimal human involvement.

**EXAMPLES:**  
Automated workflows, self-running processes, agentic AI systems

More Human Control

More AI Autonomy



Human Capabilities	AI Role	Task Completion
Shifts from sole reliance to collaborative enhancement	Evolves from tool to partner to autonomous agent	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

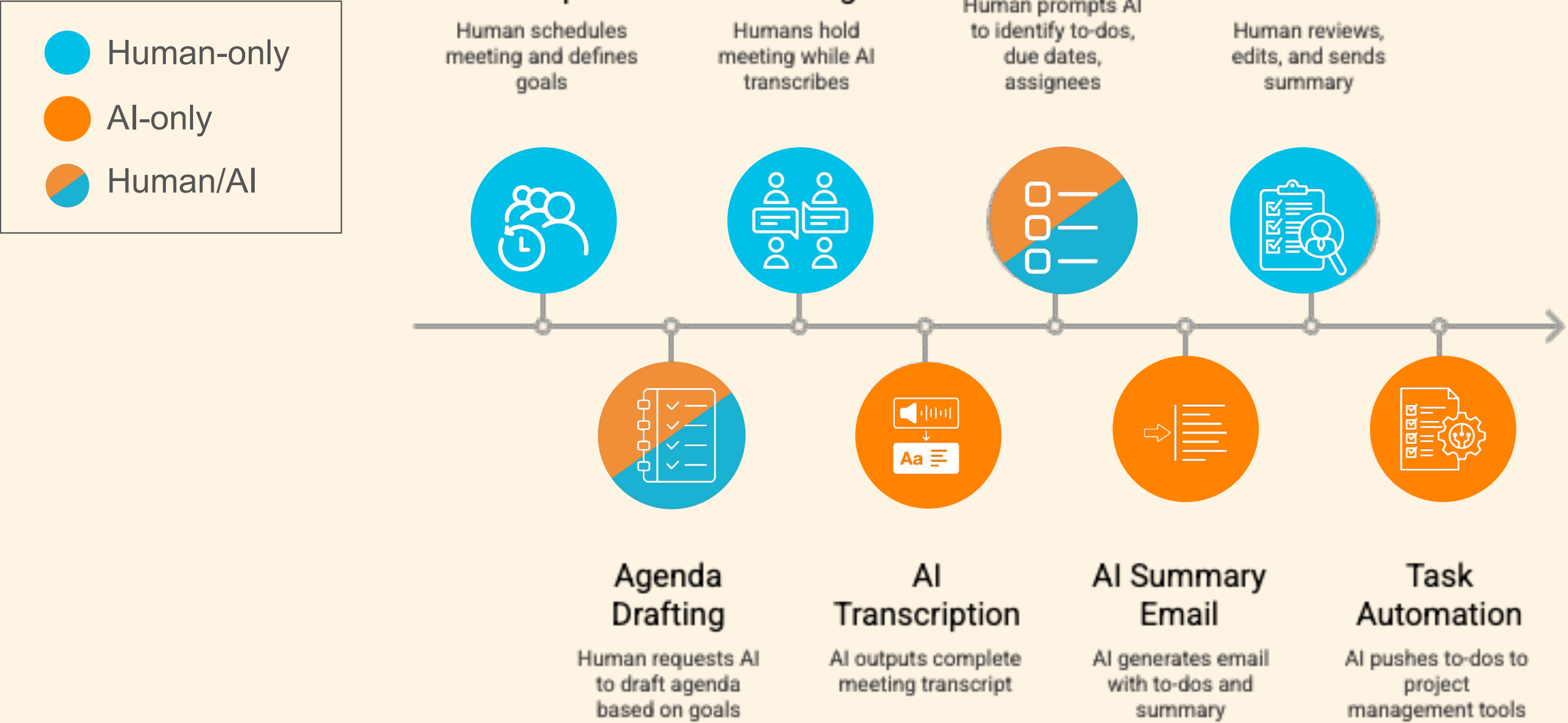
AI drafts meeting notes from your recordings, but you review and personalize them before sending. AI suggests job matches for participants, but you evaluate fit and make the introduction.

## 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

A stylized, flat-design illustration of a landscape. A large, multi-colored rainbow arches over a winding river. The river is dark grey with white lines indicating ripples and is dotted with several large, green lily pads. On the left bank, two small figures are walking. On the right bank, a person stands near a large orange rock, and another figure is visible further back. The background features rolling hills in shades of green and blue, and a sky with soft, white clouds. The overall color palette is warm and pastel.

# Brainstorm



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

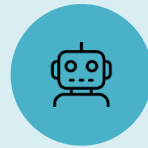
# Before You Build: Know Your Resources

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

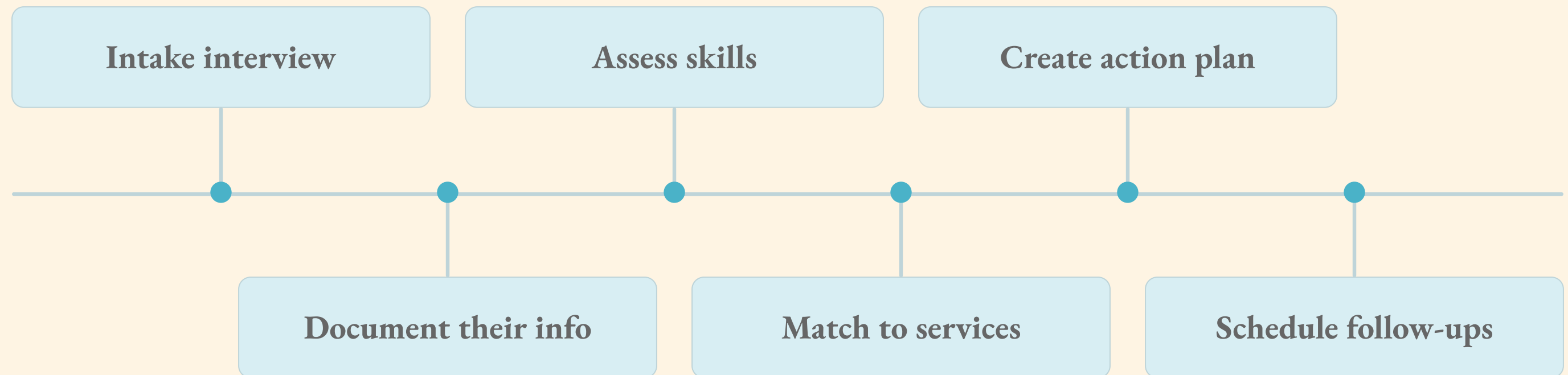


## Your Context

- 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>





A stylized, flat-design illustration of a landscape. A large, multi-colored rainbow arches over a winding river. The river is filled with lily pads and has small ripples. In the background, there are rolling hills and several tall, thin, conical trees. On the left bank, two small figures are walking. On the right bank, a group of three figures is standing near a small orange structure. The sky is a warm, light orange color with a few small clouds.

# 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*



## ChatGPT / Claude Projects

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

### Best For:

*Developing and associating related work*



Microsoft  
Copilot



ChatGPT



Gemini



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

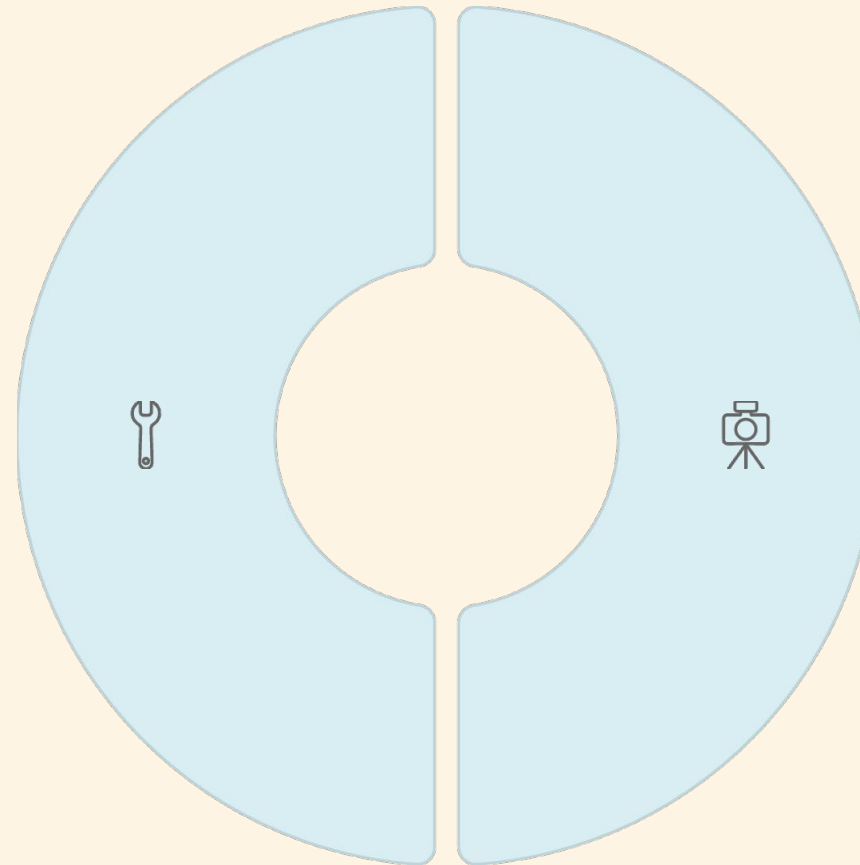
The concept is the same across platforms—you're creating specialized assistants that know how you work and what you need.

# Platform Comparison

## Custom Assistants

ChatGPT GPTs, Gemini Gems, Copilot Agents

- 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

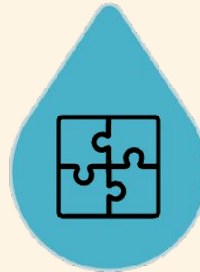
## Start

Begin with the meta  
prompt



## Assess

Review and modify as  
needed



## Convert

Create a custom GPT,  
Gem, or Agent

The background of the slide is a soft-focus, light-colored image. It shows a computer keyboard in the foreground, with a hand visible on the right side, appearing to type. The overall tone is warm and professional, with a light beige or cream color palette. The text is overlaid on this background.

**Live Demo**

**Meeting Notes Analyzer GPT**

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

---

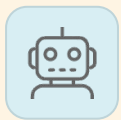
Metaprompt Instructions:

<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

A stylized, flat-design illustration of a landscape. A large, multi-colored rainbow arches over a winding river. The river flows from the foreground towards the background, with several large, circular lily pads floating on its surface. On the left bank, two small figures are standing near some reeds. On the right bank, a person is standing near a large, orange, egg-shaped object, and another figure is visible further back. The background features rolling hills and stylized trees under a warm, orange-toned sky with soft clouds.

# 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

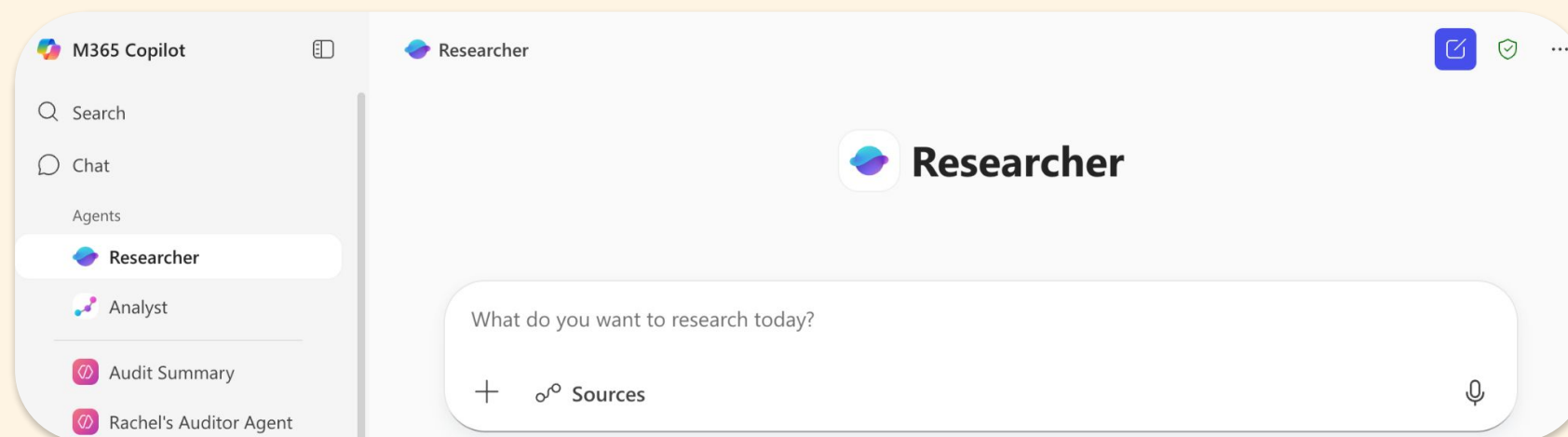
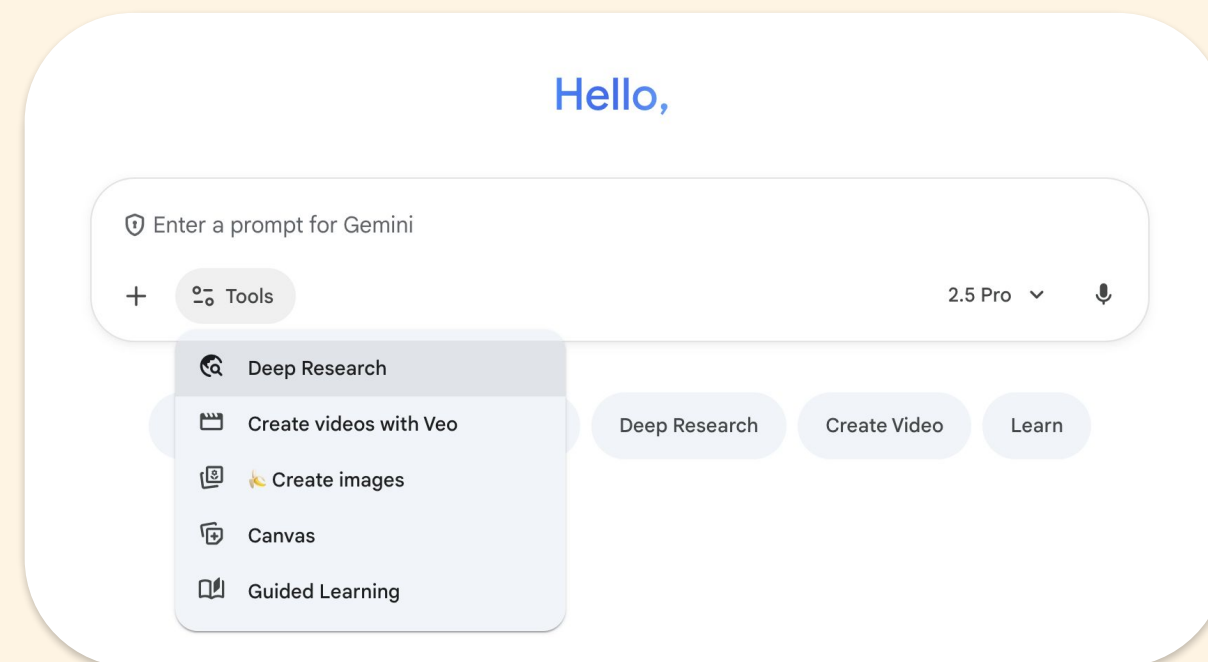
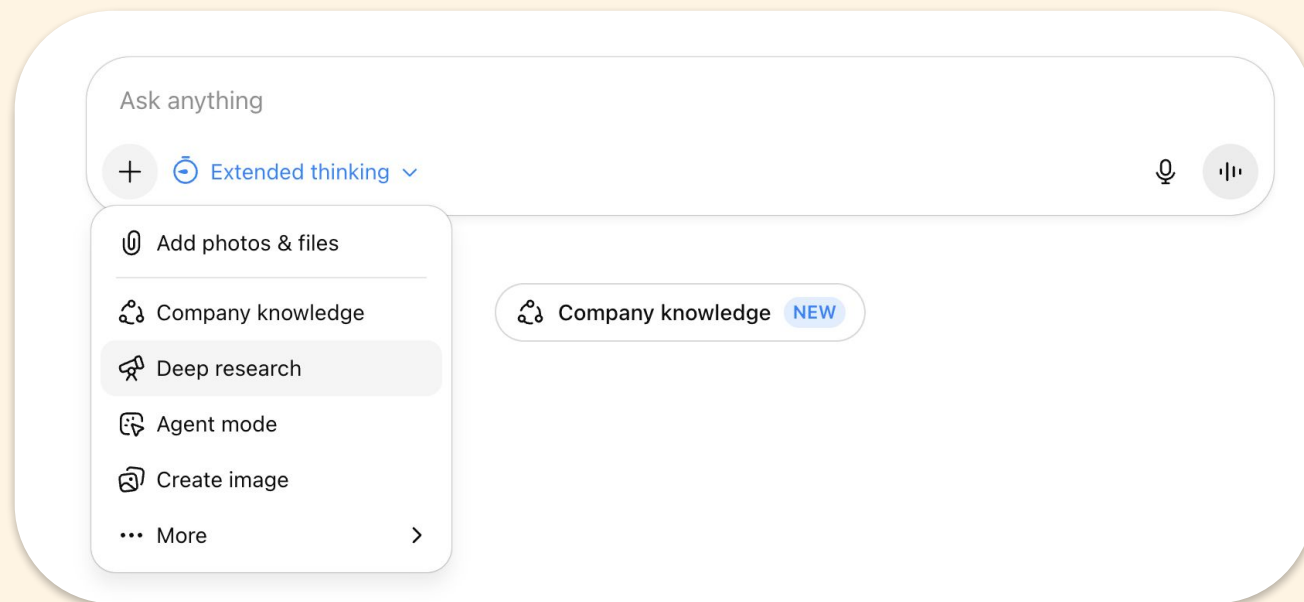
Uses reasoning to follow inquiry threads for deeper insights.

Then...



Now!

# How do you do deep research?



# Your Turn to Explore

**Pick a research topic**

# Drawing Prompt Challenge

The background of the image is a soft-focus photograph of a person's hand typing on a light-colored computer keyboard. The hand is positioned on the right side of the frame, with fingers pressing down on the keys. The keyboard is a standard QWERTY layout. Overlaid on this background is the text 'Drawing Prompt Challenge' in a large, bold, dark blue serif font. The text is centered horizontally and occupies the middle portion of the image. The overall aesthetic is clean and professional, with a warm, slightly desaturated color palette.



A blurred background image showing a person's hands typing on a laptop keyboard. The scene is dimly lit, with a warm, yellowish glow, possibly from a desk lamp. The focus is on the hands and the keyboard, while the rest of the environment is out of focus.

**How are those research projects?**



A stylized, flat-design illustration of a landscape. A large, multi-colored rainbow arches over a body of water. The water is a light blue-grey and contains several large, green lily pads with radial patterns. A winding path or river flows through the scene. In the background, there are rolling hills in shades of green and blue, and several tall, thin, conical trees. Small figures of people are visible on the hills: two on the left and one on the right. The sky is a warm, orange-yellow color with soft, white clouds. The overall mood is peaceful and serene.

# 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.

A hand is shown typing on a light-colored keyboard. In the background, a computer monitor is visible, though it is out of focus. The overall scene is dimly lit, with a warm, yellowish tint. The text 'Live Demo' is overlaid on the left side of the image in a dark blue, serif font.

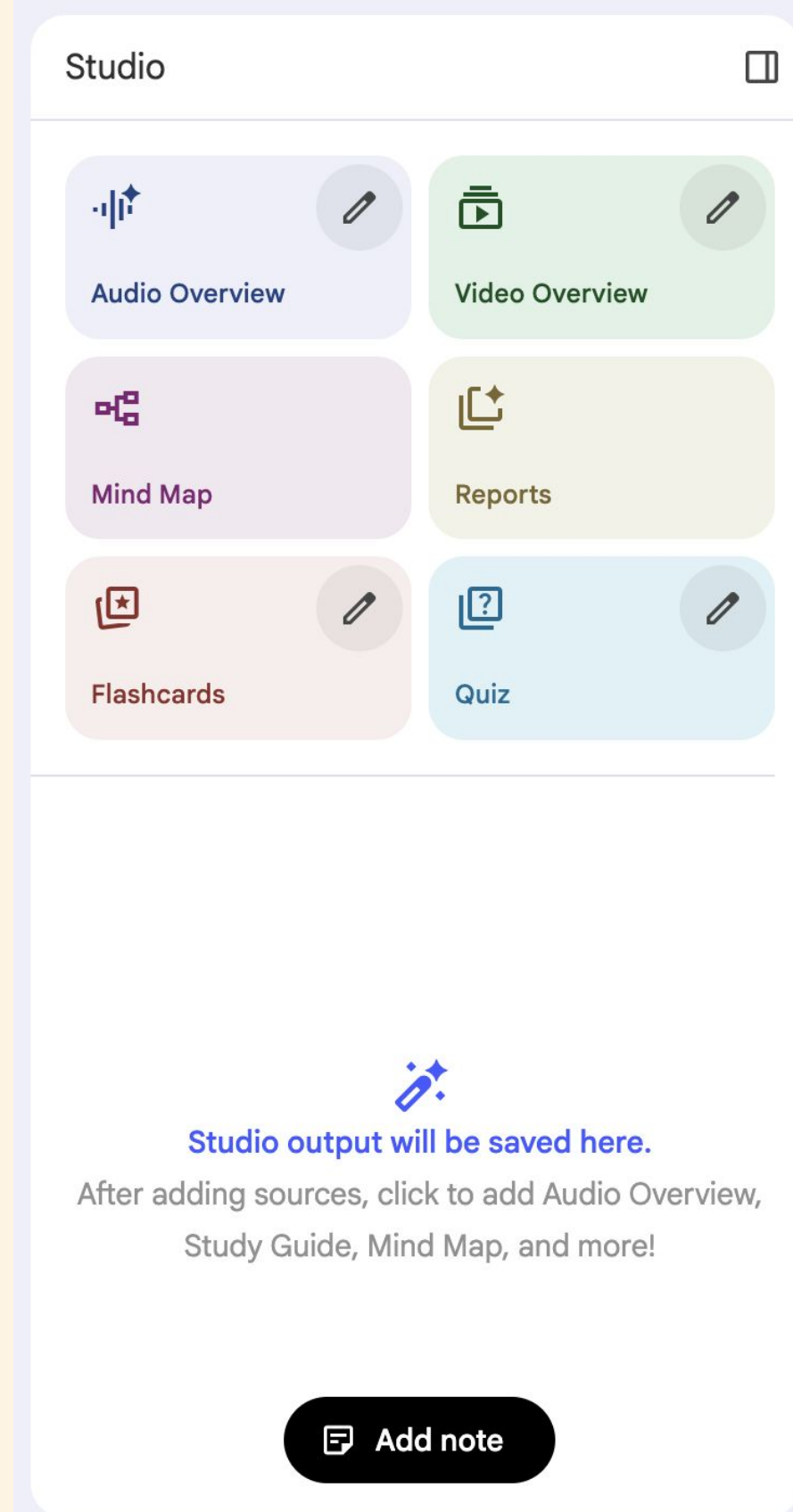
**Live Demo**

**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



A hand is shown typing on a light-colored keyboard. In the background, a computer monitor is visible, though it is out of focus. The overall scene is dimly lit, with a warm, yellowish tint. The text 'Live Demo' is overlaid on the left side of the image in a dark blue, serif font.

**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

The background of the slide features a soft-focus, light-colored image of a computer keyboard and a hand typing on it. The text is overlaid on this background in a dark blue, serif font.

# **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.



The background of the slide is a soft-focus, light-colored image. It shows a computer keyboard in the foreground, with a hand visible on the right side, appearing to type. The overall tone is warm and professional, with a light beige or cream color palette. The text is overlaid on the left side of the image.

**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>



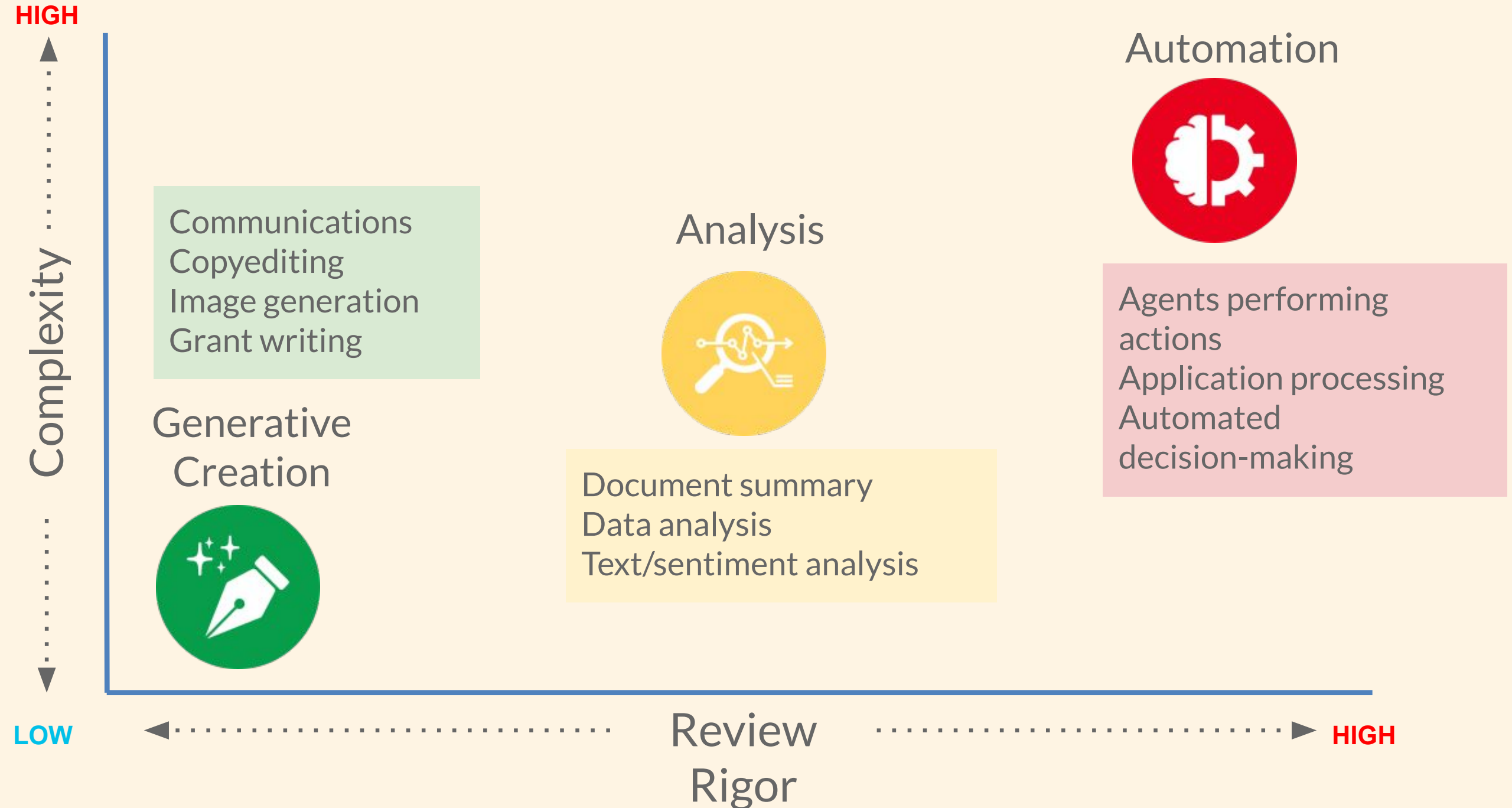
# The Critical Step We Can't Skip: Verification

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



How do today's skills  
and capabilities apply?



# COMPAS

## USING AI EFFECTIVELY



### Context

understand the situation



### Objective

design an approach



### Method

design an approach



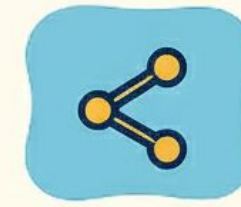
### Performance

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

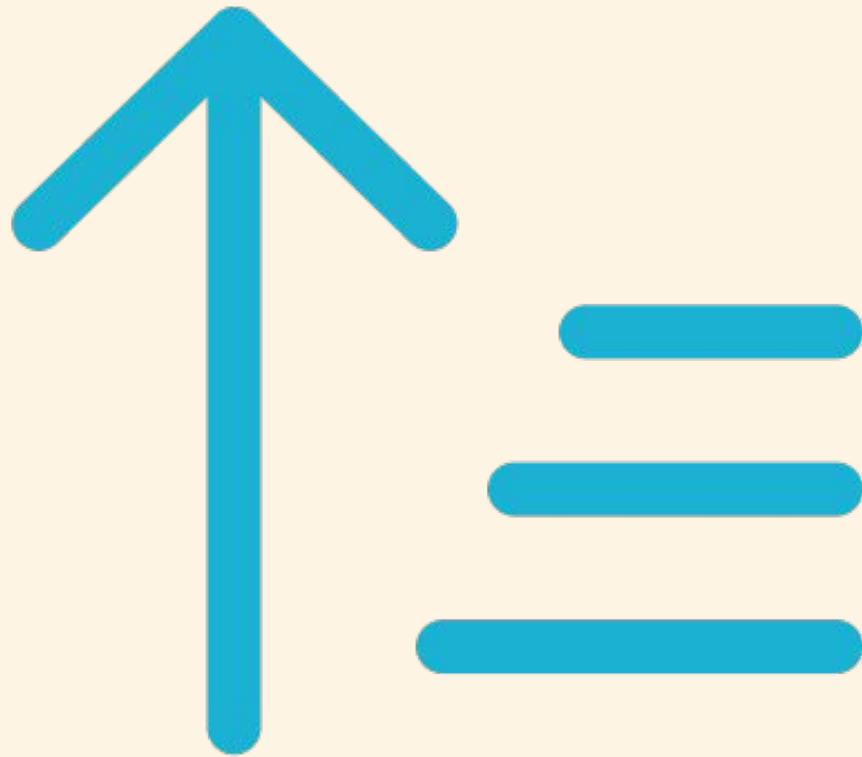


## Structured Approaches

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?

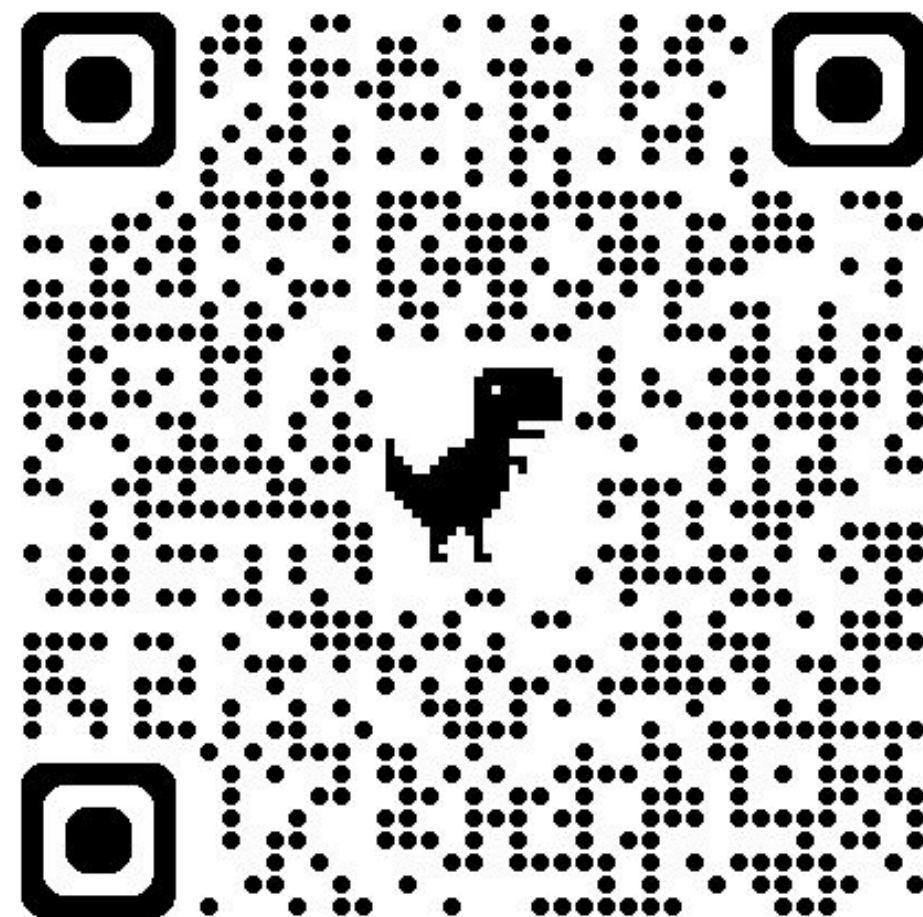
**Assessment isn't just verification - it's continuous improvement.**



# Zombie Apocalypse Readiness Check (ZARC)

By community builder 8

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.



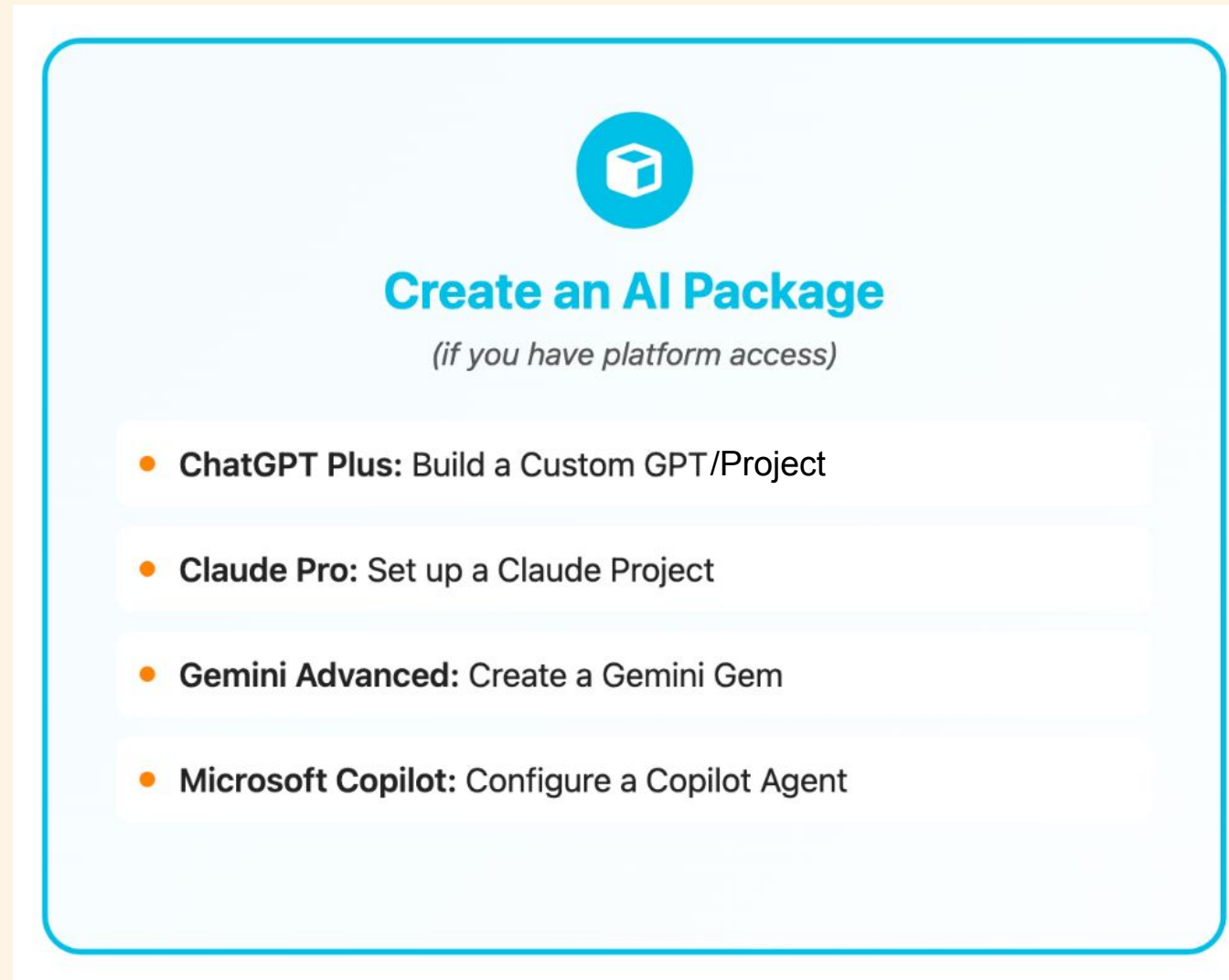



A stylized, flat-design illustration of a landscape. A large, multi-colored rainbow arches over a scene of rolling hills in shades of green and blue. A winding river flows through the foreground, dotted with several large, green lily pads. Small, simplified figures of people are visible on the riverbanks. The sky is a warm, light orange color with a few small, white clouds. The overall mood is peaceful and hopeful.

# Bringing it Back to Your Organization



# Bringing this back to your organizations

A screenshot of a user interface for creating an AI package. At the top center is a blue circular icon containing a white cube. Below the icon, the text 'Create an AI Package' is displayed in a bold blue font, followed by the subtitle '(if you have platform access)' in a smaller, italicized grey font. A list of four items, each preceded by an orange dot, is shown below. The items are: 'ChatGPT Plus: Build a Custom GPT/Project', 'Claude Pro: Set up a Claude Project', 'Gemini Advanced: Create a Gemini Gem', and 'Microsoft Copilot: Configure a Copilot Agent'. The entire content is enclosed in a light blue rounded rectangle with a thin blue border.



**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!



Powered By QuestionPro