AI for Knowledge Workers

Complete Starter Kit

Your Companion Workbook for the 12-Episode Video Series

Practical automation for professionals behind the firewall

◆ hitit.ai

AI Education for the Thoughtful Mind

What's Inside

- ✅ Worksheets & templates for every episode
- ✅ Safety checklists that protect your career
- ✅ The Mini-Spec template that makes AI actually useful
- ✅ The 5-Question Playbook for any future automation
- ✅ Quick reference cards for your desk

Welcome to Your Starter Kit

About This Workbook

This workbook is your hands-on companion to the "AI for Knowledge Workers" video series. It's designed to transform watching into doing—every concept has a worksheet, every lesson has an exercise, every episode builds toward your first automation.

How to use this workbook:

1. **Watch the episode** — Get the concepts and context
2. **Complete the worksheets** — Apply what you learned to YOUR workflow
3. **Build progressively** — Each episode builds on the previous one
4. **Keep it accessible** — Print the quick reference cards for your desk

Before You Start Checklist

Complete these items before beginning Episode 0:

Preparation Step	Done?
I have time available for each episode	☐
I have a specific workflow in mind that frustrates me	☐
I have access to a computer where I can take notes	☐
I understand this is a hands-on course, not passive watching	☐
I'm prepared to build something real, even if imperfect	☐

Your Learning Journey

The Four Phases

Phase	Episodes	What You'll Accomplish
Foundation	0-2	Understand your unique constraints; identify your first workflow; recognize you're already an architect
Safety & Setup	3-6	Learn AI's real capabilities; master data safety; set up your toolkit and workspace
Build	7-10	Organize files; select your project; write a Mini-Spec; build your first automation
Playbook	11-12	Extend to email safely; create your universal automation framework

Series Roadmap

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║ PHASE 1: FOUNDATION                              ║
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║ Ep 0: Why I Made This Series                     ║
║ Ep 1: Why Your World Is Different                ║
║ Ep 2: Shadow Systems — You're Already an Architect ║
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║ PHASE 2: SAFETY & SETUP                          ║
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║ Ep 3: AI as Your Junior Assistant (Not a Magic Wand) ║
║ Ep 4: Safety First — What Never Leaves Your Network    ★ ║
║ Ep 5: Your AI Toolkit Behind the Firewall        ║
║ Ep 6: Setting Up Your Local Workbench            ║
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║ PHASE 3: BUILD                                   ║
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║ Ep 7: Organizing Your Files                      ║
║ Ep 8: Choose Your First Excel Workflow           ║
║ Ep 9: Turn Your Workflow into a Mini-Spec       ★★ ║
║ Ep 10: Build Your First Automation with AI       ║
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║ PHASE 4: PLAYBOOK                                ║
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║ Ep 11: Intro to Mailbox Automation (Safely)      ║
║ Ep 12: Your Automation Playbook — Series Finale ★★ ║
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★ = High-value standalone material
★★ = Transformation documents (use forever)
```

Your Progress Tracker

Check off each episode as you complete it

Ep	Title	Watched	Worksheet	Homework
0	Why I Made This Series	☐	☐	☐
1	Why Your World Is Different	☐	☐	☐
2	Shadow Systems	☐	☐	☐
3	AI as Your Junior Assistant	☐	☐	☐
4	Safety First ★	☐	☐	☐
5	Your AI Toolkit	☐	☐	☐
6	Setting Up Your Workbench	☐	☐	☐
7	Organizing Your Files	☐	☐	☐
8	Choose Your First Workflow	☐	☐	☐
9	Turn Your Workflow into a Mini-Spec ★★	☐	☐	☐
10	Build Your First Automation	☐	☐	☐
11	Intro to Mailbox Automation	☐	☐	☐
12	Your Automation Playbook ★★	☐	☐	☐

My start date: __ *Target completion:* __

The Progressive Homework Chain

Each episode's homework builds on the previous:

Episode	Homework	Builds On
1	Identify one repeating workflow	—
2	Document that workflow deeply	Episode 1
3	Test AI with a low-stakes task	Episodes 1-2
4	Create synthetic version of your data	Episodes 1-3
7	Create project folder structure	Episode 4
8	Score candidates and commit to one	Episodes 1-7
9	Write complete Mini-Spec	Episode 8
10	Build the automation	Episode 9
12	Apply 5-Question Playbook	All previous

⚠️ **Important:** Don't skip episodes. The chain is designed so each step prepares you for the next.

Quick Navigation

If You Need...	Section
🛡️ Data safety checklist	Episode 4 — Safety First
📁 Folder structure template	Episode 7 — Organizing Files
📊 Workflow scoring matrix	Episode 8 — Choose Your Workflow
📋 Mini-Spec template	Episode 9 — Mini-Spec
🎯 5-Question Playbook	Episode 12 — Playbook
🗂️ All quick reference cards	Quick Reference Cards section

A Note on Pace

This isn't a race. Some people complete the series in a focused week. Others take a month, fitting episodes between meetings. Both approaches work.

What matters:

- Complete the homework before moving on
- Use YOUR real workflow as the case study
- Build one thing successfully before scaling up

You're not just watching videos—you're building a skill that compounds over time.

Let's begin.

Phase 1: Foundation — Episodes 0-2

Understanding your reality and recognizing your existing expertise

Outcome: You'll identify your first automation candidate and recognize you're already doing architect-level work

Episode 0: Why I Made This Series

Your Motivation Anchor

Why are you here? What do you hope to accomplish?

What frustrates you about your current workflows?

What would change if you could automate your most tedious tasks?

What's one thing you hope to build by the end of this series?

The Core Message

> *"The upgrade isn't given. It's earned."*

This series exists because generic AI tutorials don't work for knowledge workers behind firewalls. The path forward requires:

Step	What It Means
Showing up	Committing to learn, even when it's uncomfortable
Building	Creating something real, not just consuming content
Failing	Accepting that first attempts won't be perfect
Trying again	Using failures as information, not stopping points

Episode 1: Why Your World Is Different

My Work Reality Audit

Check all that apply to your situation

Infrastructure Constraints

Constraint	Applies to Me
I connect through a VPN	☐ Yes ☐ No
My laptop is managed/locked down by IT	☐ Yes ☐ No
I can't install software without approval	☐ Yes ☐ No
My files live on network drives or SharePoint	☐ Yes ☐ No
I use organization-specific software	☐ Yes ☐ No

Compliance & Oversight

Constraint	Applies to Me
I complete annual security/privacy training	☐ Yes ☐ No
I handle sensitive data (health, financial, HR)	☐ Yes ☐ No
My work is subject to regulatory requirements	☐ Yes ☐ No
Data sharing outside org requires approval	☐ Yes ☐ No
I can't use certain cloud tools for work data	☐ Yes ☐ No

The Three False Assumptions

Generic AI tutorials assume these—but they're probably wrong for you:

Assumption	Reality Check	Your Situation
"You can install anything"	Most corporate laptops are locked down	☐ Can install ☐ Need approval ☐ Can't install
"You can upload anything"	Data policies restrict what leaves your network	☐ Can upload freely ☐ Some restrictions ☐ Strict limits
"Compliance doesn't matter"	Your job depends on following data rules	☐ No compliance ☐ Some rules ☐ Heavy compliance

Your reality score: Count your "Yes" answers above.

- **0-4 constraints:** Standard environment—many tutorials may work
- **5-7 constraints:** Restricted environment—this series is for you
- **8+ constraints:** Heavily restricted—this series is definitely for you

Episode 1 Homework: Workflow Identification Sheet

Find one repeating workflow that's a candidate for automation

Criteria for a Good First Workflow

Criterion	What It Means	✓
Repeated often	You do it daily, weekly, or monthly	☐
Involves data manipulation	Copy-paste, filtering, rearranging, summarizing	☐
Tedious when tired	Error-prone, boring, or frustrating	☐
You understand it completely	No black boxes or mystery steps	☐

My Workflow Candidate

Field	Your Answer
What do you call this task?	
How often do you do it?	☐ Daily ☐ Weekly ☐ Monthly ☐ Other: _
How long does it take?	_ minutes
Where does the data START?	
What do you DO to it?	
What is the FINAL RESULT?	
Why is this annoying?	

Episode 2: Shadow Systems — You're Already an Architect

What Are Shadow Systems?

Shadow systems are the informal tools and processes you've built that aren't designed by IT or vendors. They exist because official systems don't match your real work.

Examples:
- The 47-tab Excel workbook that tracks everything
- The "temporary" Access database from 2017 that's still running

- The color-coded project tracker everyone depends on
- The email template you created that the whole team uses

Shadow System Inventory

List the informal systems you've created or maintain

System Name	What Problem Does It Solve?	Who Uses It?	What Would Break If It Disappeared?

Architect Skills Self-Assessment

You're already doing these things—even if you don't use these labels

Skill	What It Looks Like	I Do This
Requirements Work	Figuring out what information matters and what doesn't	☐
Data Modeling	Deciding what columns to include, how to structure data	☐
Process Design	Creating step-by-step workflows others can follow	☐
Quality Control	Using formulas, conditional formatting, or checks to catch errors	☐
Documentation	Adding comments, README sheets, or instructions	☐
Integration	Connecting data from multiple sources	☐
Training	Teaching others how to use your systems	☐

Count your checkmarks: _____ / 7

If you checked 3+: **You're already an architect.** You just didn't have the title.

Episode 2 Homework: System Deep Dive

Pick your most important shadow system and analyze it

The System

Field	Your Answer
System name	
How long has it existed?	
Did you create it or inherit it?	

The Problem It Solves

Who Depends On It

User/Team	How They Use It

Data Flow Analysis

Question	Your Answer
What information flows INTO this system?	
Where does that information come from?	
What information flows OUT of this system?	
Where does that output go?	

Key Fields/Columns

List the most important data elements

Field/Column Name	What It Contains	Why It Matters

Risk Assessment

Question	Your Answer
What happens if this system disappears tomorrow?	
How many hours/week does this system save?	
What errors does this system prevent?	
Could someone else maintain it if you left?	☐ Yes ☐ Partially ☐ No

The Key Insight

You're not "just good at Excel."

When you build a shadow system, you're doing the same work as professional software architects:
- Gathering requirements
- Designing data structures
- Creating processes
- Building quality controls
- Documenting for others

The difference? They get paid six figures and have job titles. You do it between meetings and call it "just a spreadsheet."

This series helps you formalize and extend these skills—not learn them from scratch.

Phase 1 Checkpoint

Before moving to Phase 2, confirm:

Checkpoint	Complete?
I understand why generic AI tutorials don't work for me	☐
I've identified at least one repeating workflow	☐
I've documented at least one shadow system	☐
I recognize I'm already doing architect-level work	☐

All checked? You're ready for Phase 2: Safety & Setup.

Phase 2: Safety & Setup — Episodes 3-6

Setting realistic expectations and building your safe foundation

Outcome: You'll understand AI's real capabilities, master data safety, and have a working development environment

Episode 3: AI as Your Junior Assistant (Not a Magic Wand)

What AI Actually Is

Think of AI as a **brilliant intern** who:

Capability	Reality	What You Need to Do
Has broad knowledge	May not know your specific domain	Provide context
Works fast	Makes confident mistakes	Always verify
Doesn't understand office politics, compliance	Lacks real-world judgment	You provide the judgment
Each conversation starts fresh (usually)	No memory between sessions	Re-provide context as needed
Doesn't know current events	Training data has a cutoff date	Verify time-sensitive info

The Five Rules for Working with AI

Rule 1: Never Trust It Blindly

What it means	Treat every AI output as a draft that needs review
What to do	Read the output. Check the facts. Test the code.
Red flags	AI saying "Done!" without proof, invented function names, too-confident answers

Rule 2: Be Specific

What it means	The more detail you provide, the better the output
What to do	Include context, constraints, examples, and format requirements
Bad prompt	"Help me with Excel"
Good prompt	"I have a weekly sales report in Excel with columns Date, Product, Region, Units, Revenue. I need a formula to sum Revenue for rows where Region equals 'North' and Date is in January 2025."

Rule 3: Share Your Constraints

What it means	AI doesn't know about your VPN, locked laptop, or compliance rules
What to do	State your environment: "I'm using Excel 365, can't install Python, need to use synthetic data only"
Why it helps	AI can suggest solutions that actually work in your situation

Rule 4: Expect to Iterate

What it means	First response is rarely perfect; it's a conversation
What to do	Ask follow-ups, provide corrections, request alternatives
Iteration examples	"That's close, but I also need..." / "Can you make it simpler?" / "This didn't work, I got error X"

Rule 5: You Make the Final Call

What it means	AI suggests; you decide. Your name is on the work.
What to do	Review, modify, approve. Never send/deploy AI output without checking.
Your responsibility	The formula, email, code, or process—you're accountable for it

Five Rules Quick Reference

Rule	One-Liner
1	Never trust blindly — It's a draft, not a deliverable
2	Be specific — Detail in = quality out
3	Share constraints — AI doesn't know your environment
4	Iterate — First try is a starting point
5	You decide — AI suggests, you approve

AI Experiment Log

Use this template to document your AI experiments

Experiment Details

Field	Your Entry
Date	
Task description	
AI tool used	
Prompt I used	

Results

Field	Your Entry
What AI did well	
What AI got wrong or missed	
Did I need to iterate?	☐ No, first try worked ☐ Yes, _____ rounds

Reflection

Field	Your Entry
How would I improve my prompt next time?	
Overall usefulness	☐ Very useful ☐ Somewhat useful ☐ Not useful

Episode 3 Homework

1. Pick one low-stakes, non-sensitive task
2. Use AI to help with it, following the Five Rules
3. Complete the AI Experiment Log above
4. Reflect: What did you learn about working with AI?

Good starter tasks:
- Draft an email (review before sending)
- Explain a concept you're learning
- Brainstorm ideas for a project
- Create an Excel formula (test before using)

Episode 4: Safety First — What Never Leaves Your Network

🌟 **HIGH-VALUE EPISODE** — This is standalone material you'll reference throughout your career

The Core Principle

Safety isn't about restriction—it's about enablement. When you know exactly what data is safe to share, you can use AI tools confidently without second-guessing every interaction.

Default stance: When in doubt, don't share. Make a fake version instead.

PHI Quick Reference: The 18 HIPAA Identifiers

If your data is health-related AND contains ANY of these identifiers, it NEVER goes to public AI tools.

Category 1: Direct Identifiers

Identifier	Examples	Safe Alternative
Names	First, last, maiden names	"Patient A", "John Doe"
Full addresses	Street, city (elements smaller than state)	State only, or "00000"
Dates	Birth date, admission, discharge, death (except year)	Year only, or age range
Phone numbers	Any format	555-000-0000
Fax numbers	Any format	555-000-0000
Email addresses	personal@email.com	fake@example.com

Category 2: System Identifiers (Tied to Person)

Identifier	Examples	Safe Alternative
Social Security numbers	123-45-6789	000-00-0000
Medical record numbers	MRN-12345	MRN-XXXXX
Health plan beneficiary numbers	Insurance member IDs	PLAN-00000
Account numbers	Patient accounts, billing	ACCT-00000
Certificate/license numbers	Provider licenses	LIC-00000

Category 3: Device & Biometric Identifiers

Identifier	Examples	Safe Alternative
Vehicle identifiers	License plates, VINs	Remove entirely
Device identifiers/serial numbers	Medical device IDs	DEV-00000
Web URLs	Personal pages	Remove entirely
IP addresses	192.168.1.1	0.0.0.0
Biometric identifiers	Fingerprints, voice prints	Remove entirely
Full-face photos	Identifiable images	Remove entirely
Any other unique identifying number	Custom org IDs	ID-00000

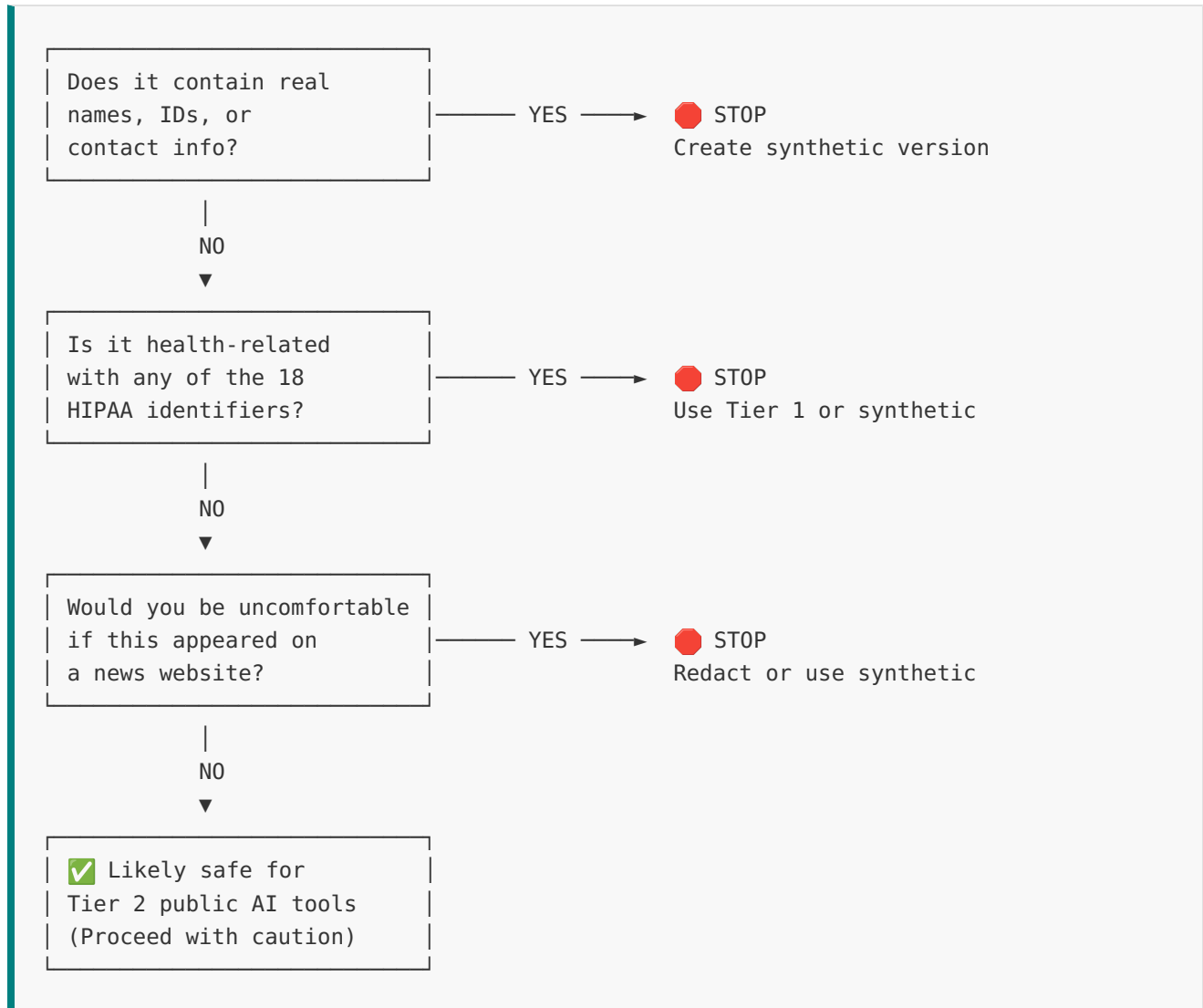# PII Quick Reference: Beyond Healthcare

Even if not health-related, this data requires protection

Data Category	Examples	Risk Level
HR Records	Salaries, reviews, disciplinary actions	🔴 HIGH
Customer Data	Names + purchase history, complaints	🔴 HIGH
Financial Information	Bank accounts, transaction details	🔴 HIGH
Student Records	Grades, disciplinary records, addresses	🔴 HIGH
Legal Documents	Contracts with names, litigation details	🔴 HIGH
Contact Lists	Names + emails + phone numbers	🟡 MEDIUM
Internal Communications	Sensitive emails, strategy discussions	🟡 MEDIUM

The Screenshot Test: Would you be uncomfortable seeing this data on a news website with your name attached? If yes, treat it as sensitive.

Data Safety Decision Flowchart

```
┌─────────────────────────┐
│ Does it contain real    │
│ names, IDs, or          │────── YES ──────▶  🛑 STOP
│ contact info?           │                    Create synthetic version
└─────────────────────────┘
            │
            NO
            ▼
┌─────────────────────────┐
│ Is it health-related    │
│ with any of the 18      │────── YES ──────▶  🛑 STOP
│ HIPAA identifiers?      │                    Use Tier 1 or synthetic
└─────────────────────────┘
            │
            NO
            ▼
┌─────────────────────────┐
│ Would you be uncomfortable │
│ if this appeared on     │────── YES ──────▶  🛑 STOP
│ a news website?         │                    Redact or use synthetic
└─────────────────────────┘
            │
            NO
            ▼
┌─────────────────────────┐
│ ✅ Likely safe for      │
│ Tier 2 public AI tools  │
│ (Proceed with caution)  │
└─────────────────────────┘
```

Creating Synthetic Data

What Is Synthetic Data?

Synthetic data is **fake data that has the same structure as your real data**. It lets you test workflows and get AI help without risking exposure.

Quick Replacement Guide

Real Data	Synthetic Version
John Smith	Person_001
555-123-4567	555-000-0001
john.smith@company.com	user001@example.com
123 Main St, Boston	100 Example St, [ADDRESS REMOVED], MA
04/15/1980	01/01/1980 (or just "1980")
SSN: 123-45-6789	SSN: 000-00-0001
MRN: 7891234	MRN: TEST001

Synthetic Data Creation Checklist

Step	Done?
Identified all columns/fields with real identifiers	☐
Created replacement values that preserve data structure	☐
Verified no real identifiers remain	☐
Saved synthetic version with clear naming	☐
Stored in appropriate folder	☐

Naming convention: `YYYY-MM-DD_[workflow]_synthetic_v1.xlsx`

Episode 4 Homework: Create Your First Synthetic Dataset

Take your Episode 1 workflow and create a synthetic version of the data.

Step	Action	Done?
1	Open your real data file	☐
2	Save as new file with "_synthetic_v1" suffix	☐
3	List all columns with identifiers	☐
4	Replace each identifier with synthetic version	☐
5	Double-check: search for real names, emails, IDs	☐
6	Save and close	☐
7	Store in project input folder	☐
8	Delete or secure any temporary files	☐

Your Synthetic Data Map

Column/Field	Original Type	Synthetic Approach

Final filename: _____synthetic_v1.xlsx

Episode 5: Your AI Toolkit Behind the Firewall

The Three Tiers of AI Tools

Tier	Type	When to Use	Data Rules
1	Organizational (Copilot, etc.)	Real work data	If org-approved
2	Public AI (ChatGPT, Claude, Gemini)	Learning, generic help	Synthetic only
3	Local AI (GPT4All, Ollama, LM Studio)	Sensitive experiments	Data stays local

Tier 1: Organizational Tools

These are AI tools **your organization has vetted and approved**.

Tool	Common Uses	Key Benefit
Microsoft Copilot (365)	Email drafts, document summaries, Excel help	Integrated, org-approved
Enterprise ChatGPT	Various	Data protection agreements in place
Org-specific tools	Varies	Built for your compliance needs

How to find out what your org has:

- Ask IT or your manager
- Check your organization's software catalog
- Look for "AI" or "Copilot" in recent communications

My Tier 1 Inventory

Tool	Available?	I Have Access?	Approved Uses
	☐ Yes ☐ No ☐ Unknown	☐ Yes ☐ No	
	☐ Yes ☐ No ☐ Unknown	☐ Yes ☐ No	
	☐ Yes ☐ No ☐ Unknown	☐ Yes ☐ No	

Tier 2: Public AI Tools

These are general-purpose AI tools available to anyone.

Tool	Best For	Limitation
ChatGPT	Versatile, widely used	Data goes to OpenAI servers
Claude	Strong reasoning, long documents	Data goes to Anthropic servers
Google Gemini	Google integration	Data goes to Google servers

Golden Rule: Never put real sensitive data in Tier 2 tools. Use synthetic data only.
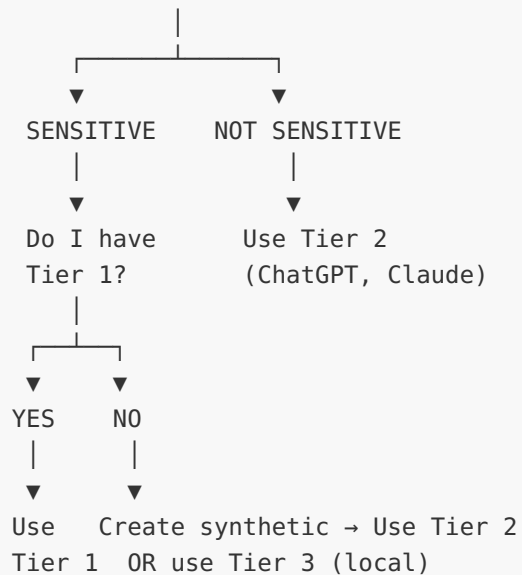
Tier 3: Local AI Tools

These run entirely on your computer—data never leaves your machine.

Tool	Best For	Setup Difficulty
GPT4All	Beginners, simple interface	Easy
LM Studio	Experimenting with models	Medium
Ollama	Command-line users	Medium

Trade-off: Local AI is safer but typically less capable than cloud AI.

Choosing the Right Tier

```
START: What kind of data am I working with?
               |
        ┌──────┴──────┐
        ▼             ▼
   SENSITIVE    NOT SENSITIVE
        |             |
        ▼             ▼
   Do I have     Use Tier 2
   Tier 1?       (ChatGPT, Claude)
        |
     ┌──┴──┐
     ▼     ▼
   YES    NO
    |     |
    ▼     ▼
  Use   Create synthetic → Use Tier 2
  Tier 1  OR use Tier 3 (local)
```

Episode 5 Homework: Tool Inventory

Complete this inventory to understand your toolkit options.

Tier 1 (Organizational) — Check with IT

Question	Answer
Does my organization offer any AI tools?	☐ Yes ☐ No ☐ Don't know
What are they?	
Do I have access?	☐ Yes ☐ No ☐ Need to request
What can I use them for?	

Tier 2 (Public) — Your Personal Accounts

Tool	Have Account?	Used Before?
ChatGPT	☐ Yes ☐ No	☐ Yes ☐ No
Claude	☐ Yes ☐ No	☐ Yes ☐ No
Google Gemini	☐ Yes ☐ No	☐ Yes ☐ No
Other: _	☐ Yes ☐ No	☐ Yes ☐ No

Tier 3 (Local) — For Future Reference

Tool	Interested?	Notes
GPT4All	☐ Yes ☐ No	
LM Studio	☐ Yes ☐ No	
Ollama	☐ Yes ☐ No	

Episode 6: Setting Up Your Local Workbench

What You'll Install

Tool	What It Does	Required?
Python	Programming language for automation	Yes
VS Code	Code editor	Yes
Python Extension	Makes VS Code work with Python	Yes

Python Installation Checklist

Step	Action	Done?
1	Go to python.org/downloads	☐
2	Download Python 3.12 (or latest 3.x)	☐
3	Run installer	☐
4	✅ CHECK "Add Python to PATH"	☐
5	Click "Install Now"	☐
6	Verify: Open command prompt, type `python --version`	☐

Expected result: `Python 3.12.x` (or similar)

VS Code Installation Checklist

Step	Action	Done?
1	Go to code.visualstudio.com	☐
2	Download for your OS	☐
3	Run installer with defaults	☐
4	Open VS Code	☐
5	Go to Extensions (Ctrl+Shift+X)	☐
6	Search "Python" and install Microsoft's extension	☐
7	Restart VS Code	☐

Your First Python Test

Create a file called `hello.py` with this content:

```
print("Hello, Automation!")
print("Python is working correctly.")
```

Run it:

1. Open terminal in VS Code (View → Terminal)
2. Type: `python hello.py`
3. You should see the two lines printed

Verification	Result
Python installed correctly	☐ Yes ☐ No
VS Code opens without errors	☐ Yes ☐ No
Python extension installed	☐ Yes ☐ No
hello.py runs successfully	☐ Yes ☐ No

Phase 2 Checkpoint

Before moving to Phase 3, confirm:

Checkpoint	Complete?
I understand the Five Rules for working with AI	☐
I can identify PHI and PII in my data	☐
I've created at least one synthetic dataset	☐
I know which AI tools I have access to (Tier 1, 2, 3)	☐
Python and VS Code are installed and working	☐

All checked? You're ready for Phase 3: Build.

Phase 3: Build — Episodes 7-10

From organized files to working automation

Outcome: You'll build your first working automation using the Mini-Spec methodology

Episode 7: Organizing Your Files

The Standard Project Structure

```
Automation_Projects/
└── Project_01_[Short_Descriptive_Name]/
    ├── input/           ← Source files (read-only)
    ├── output/          ← Generated results
    ├── archive/         ← Old versions
    ├── scripts/         ← Your code files
    ├── docs/            ← Mini-specs, notes
    └── README.txt       ← How to run this project
```

Folder Creation Checklist

Step	Action	Done?
1	Create `Automation_Projects` in your documents	☐
2	Inside, create `Project_01_[Your_Workflow_Name]`	☐
3	Inside Project_01, create: input, output, archive, scripts, docs	☐
4	Create a blank README.txt	☐
5	Copy your synthetic data file to input/	☐

File Naming Convention

Format: `YYYY-MM-DD_description_tag_vN.ext`

Component	Meaning	Example
YYYY-MM-DD	Date created/modified	2025-02-01
description	What it is	weekly-report
tag	Category	raw, processed, synthetic
vN	Version number	v1, v2, v3
ext	File type	.xlsx, .py, .csv

Examples:

- `2025-02-01_weekly-report_raw_v1.xlsx`
- `2025-02-01_weekly-report_synthetic_v1.xlsx`
- `2025-02-01_process-report_v3.py`

Episode 7 Homework

Task	Done?
Create the Automation_Projects folder	☐
Create Project_01_[Your_Workflow_Name]	☐
Create all subfolders (input, output, archive, scripts, docs)	☐
Move your synthetic data to input/ folder	☐
Create a README.txt with basic info	☐

Your Project Structure

Fill in your actual folder names:

```
Automation_Projects/
└── Project_01_____/
    ├── input/
    │   └── _____.xlsx
    ├── output/
    ├── archive/
    ├── scripts/
    ├── docs/
    └── README.txt
```

Episode 8: Choose Your First Excel Workflow

The Five Selection Criteria

Criterion	What to Look For	Score 1-5
Frequency	Weekly or daily is ideal; annual is too rare	
Time	15-30 min per run is ideal; under 5 min may not be worth it	
Risk	Low risk (internal reports) beats high risk (money, clinical)	
Understanding	You know every step vs. "I figure it out each time"	
I/O Clarity	Clear start and end points vs. "it depends"	

Workflow Candidate Scoring Matrix

Score each candidate 1-5 on each criterion:

Candidate	Freq	Time	Risk	Understanding	I/O	TOTAL
						/25
						/25
						/25

Decision: Pick the highest scorer.

Tiebreaker: Which one annoys you most? That annoyance is fuel.

Episode 8 Homework

Task	Done?
List 2-3 workflow candidates	☐
Score each on the 5 criteria	☐
Pick your winner	☐
Commit to it (write it down!)	☐

My Committed Workflow

Field	Your Answer
Workflow name	
Total score	/25
Why this one?	
I commit to automating this	☐ Yes, I'm doing this

Episode 9: Turn Your Workflow into a Mini-Spec

🌟🌟 **TRANSFORMATION DOCUMENT** — Use this template for every future automation

What Is a Mini-Spec?

A Mini-Spec is a **precise, structured description** of your workflow. It's the document you give to AI (or yourself) to build automation.

Key principle: If you can't explain it precisely, you can't automate it reliably.

The 8 Sections of a Mini-Spec

Section	Core Question
1. Purpose	What does this do and why?
2. Trigger	How do I know when to start?
3. Inputs	What files/data do I need?
4. Outputs	What's the final deliverable?
5. Process	What are the exact steps?
6. Assumptions	What must be true?
7. Edge Cases	What can go wrong?
8. Testing	How do I verify it works?

Mini-Spec Template

PROJECT: [Your Workflow Name]

OWNER: [Your Name]

CREATED: [Date]

LAST UPDATED: [Date]

1. Purpose

[One or two sentences explaining in plain English]

What does this do?

Why does it matter?

---

2. Trigger

What event or condition tells me to start this workflow?

Trigger Type	Details
Time-based	☐ Daily ☐ Weekly ☐ Monthly ☐ Other: _
Event-based	☐ Email arrives ☐ File appears ☐ Other: _
On-demand	☐ When requested by: _

Specific trigger:

3. Inputs

What files or data do I need before I can start?

Input	Source Location	Format

Are there any prerequisites?

4. Outputs

What is the final deliverable?

Output	Destination	Format

How do I know it's "done"?

5. Process

What are the exact steps, in order?

Step	Action	Notes
1		
2		
3		
4		
5		
6		
7		
8		

6. Assumptions

What must be true for this to work?

Assumption	What if it's false?

7. Edge Cases

What unusual situations might occur?

Edge Case	How to Handle

8. Testing

How do I verify the automation works correctly?

Test	Expected Result	Pass?
		☐
		☐
		☐

Episode 9 Homework

Task	Done?
Fill out all 8 sections of the Mini-Spec	☐
Review for completeness	☐
Save in your project's docs/ folder	☐
Complete the safety checklist for your data	☐

Episode 10: Build Your First Automation with AI

The Two Build Paths

Path	Best For	Approach
Path A: AI-Assisted	Those comfortable with AI	Give Mini-Spec to AI, iterate on code
Path B: Step-by-Step	Those who prefer guidance	Follow structured prompts, build piece by piece

Choose your path: ☐ Path A ☐ Path B

Path A: AI-Assisted Build

The prompt formula:

```
I need to automate a workflow. Here's my Mini-Spec:


[PASTE YOUR MINI-SPEC]


My constraints:
- I'm using Python [version]
- I have Excel files (.xlsx)
- I can't install packages that require admin rights
- I need to use synthetic data for testing


Please create a Python script that:
1. Reads the input file
2. Performs the transformations in my process steps
3. Saves the output file
4. Prints confirmation of what was done
```

Build Log

Track your progress as you build:

Step	Action	Status	Notes
1	Share Mini-Spec with AI	☐ Done	
2	Get initial code	☐ Done	
3	Run code on synthetic data	☐ Done	
4	Fix errors (iterate)	☐ Done	Rounds: ___
5	Verify output matches expectations	☐ Done	
6	Test edge cases	☐ Done	
7	Save final script to scripts/	☐ Done	
8	Update README with instructions	☐ Done	

Common Issues and Fixes

Issue	Likely Cause	Fix
"Module not found"	Package not installed	Run `pip install [package]`
"File not found"	Wrong path	Check file location, use full path
"Permission denied"	File is open	Close Excel before running
Wrong output	Logic error	Check Mini-Spec steps vs. code

The Rollout Checklist

Before using your automation on real data:

Step	Action	Done?
1	Run on synthetic data successfully	☐
2	Compare output to manual result	☐
3	Test at least one edge case	☐
4	Run side-by-side with manual process once	☐
5	Document how to run it in README	☐
6	Create backup of real data before first real run	☐
7	Run on real data with output to separate folder	☐
8	Verify real output before using	☐

Automation Maturity Levels

Level	Description	Your Status
1	Works on synthetic data	☐
2	Works on real data (verified)	☐
3	Documented and repeatable	☐
4	Handles edge cases gracefully	☐

Current level: _____

Phase 3 Checkpoint

Checkpoint	Complete?
I have an organized project folder structure	☐
I selected and committed to one workflow	☐
I completed a full Mini-Spec	☐
I built a working automation (at least Level 1)	☐

All checked? You're ready for Phase 4: Playbook.

Phase 4: Playbook — Episodes 11-12

Building your sustainable automation practice

Outcome: You'll have a universal framework for any future automation project

Episode 11: Intro to Mailbox Automation (Safely)

The Four Absolute Rules of Email Automation

Rule	Why	Consequence of Breaking
1. Never auto-send without human review	One wrong send = chaos	Career damage, data breach
2. Don't auto-respond to sensitive topics	HR, legal, medical need judgment	Liability, hurt relationships
3. Don't process PHI/PII without encryption	Same rules as all data	Compliance violation
4. Don't auto-delete	Moving is fine; deletion is forever	Lost important data

Safe vs. Unsafe Email Automation

✅ Safe Patterns	❌ Unsafe Patterns
Auto-sort to folders	Auto-send anything
Flag for review	Auto-reply to sensitive
Create summaries (you review)	Process PHI/PII unencrypted
Draft responses (you send)	Auto-delete
Mark as read/unread	Auto-forward outside org

Email Automation Ideas (Safe)

Idea	Complexity	Value
Sort newsletters to a folder	Low	Medium
Flag emails from VIPs	Low	High
Summarize long email threads	Medium	High
Draft standard responses	Medium	High
Create weekly email digest	Medium	Medium

Your First Email Rule

Field	Your Answer
What emails will it affect?	
What will it do?	☐ Move ☐ Flag ☐ Categorize ☐ Other
Where will affected emails go?	
How will you verify it's working?	

Episode 11 Homework

Task	Done?
Create one auto-sort rule in your email client	☐
Test it with a sample email	☐
Verify emails are going to the right place	☐
Complete the safety checklist for your rule	☐
Identify one more email category to auto-sort	☐

The Key Principle

Safe email automation = You always control the send button.

Everything else — sorting, flagging, summarizing, drafting — is fair game. But the moment an email goes out, a human must have approved it.

Episode 12: Your Automation Playbook — Series Finale

🌟🌟 **TRANSFORMATION DOCUMENT** — Use this framework for every future automation

Your Journey So Far

You've transformed from "just good at Excel" to **Workflow Automation Architect**:

Phase	What You Learned	Episodes
Foundation	Your constraints are different; you're already an architect	0-2
Safety & Setup	AI is a junior assistant; safety enables confidence	3-6
Build	Organize → Select → Specify → Build	7-10
Playbook	Email safety; universal framework	11-12

Now you have a repeatable system for ANY future automation.

The 5-Question Automation Playbook

Use this framework every time you consider automating something

Question 1: Is This Worth Automating?

The ROI Formula:

```
Frequency × Time Saved × Pain Factor = Value
```

Factor	How to Measure	Your Workflow
Frequency	Times per year (daily=250, weekly=52, monthly=12)	_____ /year
Time per run	Minutes currently spent	_____ min
Pain factor	1 = mildly annoying, 2 = tedious, 3 = hate it	_____

Calculate:

Frequency × Time = _ minutes/year

÷ 60 = _ hours/year

× Pain factor = _ weighted hours

Decision Guide:

Weighted Hours/Year	Verdict
50+	🟢 Strong candidate — prioritize this
20-50	🟢 Good candidate — worth building
10-20	🟡 Maybe — consider if pain is high
Under 10	🔴 Probably not worth build time yet

Question 2: Is It Safe to Automate?

Safety Criterion	Check
No PHI/PII involved (or using org-approved tools)	☐ Yes ☐ No — STOP
No auto-send without human review	☐ Yes ☐ No — STOP
No critical decisions without human in loop	☐ Yes ☐ No — STOP
Failure would be annoying, not catastrophic	☐ Yes ☐ No — STOP
I have a manual fallback if automation breaks	☐ Yes ☐ No — Plan one

All boxes checked? Proceed to Question 3.

Any "No — STOP"? Redesign the automation scope or defer.

Question 3: Do I Fully Understand the Process?

Understanding Check	Response
Can I write down every step without guessing?	☐ Yes ☐ No
Do I know ALL the inputs (files, sources, triggers)?	☐ Yes ☐ No
Do I know exactly what "done" looks like?	☐ Yes ☐ No
Can I list the edge cases and exceptions?	☐ Yes ☐ No
Have I done this manually at least 5+ times?	☐ Yes ☐ No

All "Yes"? Proceed to Question 4.

Any "No"? Document the process first. Create a Mini-Spec (Episode 9).

Question 4: What's My MVP?

MVP = Minimum Viable Product: the smallest piece that delivers value

Question	Your Answer
What's the most time-consuming single step?	
What's the most error-prone step?	
What can I automate while keeping human review?	
What's the smallest change that saves real time?	

Your MVP:

Remember: You can always expand later. Start small, prove value, then grow.

Question 5: How Will I Maintain It?

Maintenance Factor	Assessment
Time available	Do I have 30 min/month for maintenance?
Process stability	Does this workflow change frequently?
Documentation	Is my Mini-Spec up to date?
Fallback plan	Can I do this manually if automation breaks?
Knowledge transfer	Could someone else maintain this if needed?

Maintenance Warning Signs:

- Workflow changes every month → Maybe don't automate yet
- Only you understand it → Document before automating
- No fallback plan → Create one first

5-Question Playbook: Complete Worksheet

Workflow: _____

Q#	Question	Your Assessment	Decision
1	Worth it?	Freq: ___ × Time: ___ min × Pain: ___ = ___ hrs/yr	☐ Yes ☐ No
2	Safe?	PHI: ☐ Auto-send: ☐ Critical: ☐ Fallback: ☐	☐ Yes ☐ No
3	Understand?	Steps: ☐ Inputs: ☐ Outputs: ☐ Edge cases: ☐	☐ Yes ☐ No
4	MVP?	Smallest valuable piece: ___	Defined
5	Maintain?	Time: ☐ Stable: ☐ Docs: ☐ Fallback: ☐	☐ Yes ☐ No

Final Decision:

Decision	Criteria
☐ PROCEED	All questions answered positively
☐ DEFER	Worth it, but need to prepare first (document, create fallback, etc.)
☐ SKIP	Not worth the investment right now

Friction Log: Finding Your Next Projects

Track your "ugh, not this again" moments for one month

Date	Task	Duration	Frequency	Pain Level	Notes
		___ min	/week /month	1 2 3	
		___ min	/week /month	1 2 3	
		___ min	/week /month	1 2 3	
		___ min	/week /month	1 2 3	
		___ min	/week /month	1 2 3	
		___ min	/week /month	1 2 3	
		___ min	/week /month	1 2 3	
		___ min	/week /month	1 2 3	

Monthly Review

Rank	Task	Hours/Year	Pain	Automate?
1				☐ Yes ☐ No ☐ Maybe
2				☐ Yes ☐ No ☐ Maybe
3				☐ Yes ☐ No ☐ Maybe

The Automation Lifecycle

Automation isn't a one-time event—it's a continuous cycle

```
    ┌──────────────────────────────────┐
    │                                  │
    ▼                                  │
┌──────────┐    ┌──────────┐    ┌──────────┐  │
│IDENTIFY  │───▶│ DOCUMENT │───▶│  BUILD   │  │
└──────────┘    └──────────┘    └──────────┘  │
    ▲                               │         │
    │                               ▼         │
┌──────────┐    ┌──────────┐    ┌──────────┐  │
│MAINTAIN  │◀───│ MONITOR  │◀───│  TEST    │  │
└──────────┘    └──────────┘    └──────────┘  │
    │                               │         │
    │                               ▼         │
    │                           ┌──────────┐  │
    └───────────────────────────│  DEPLOY  │──┘
                                └──────────┘
```
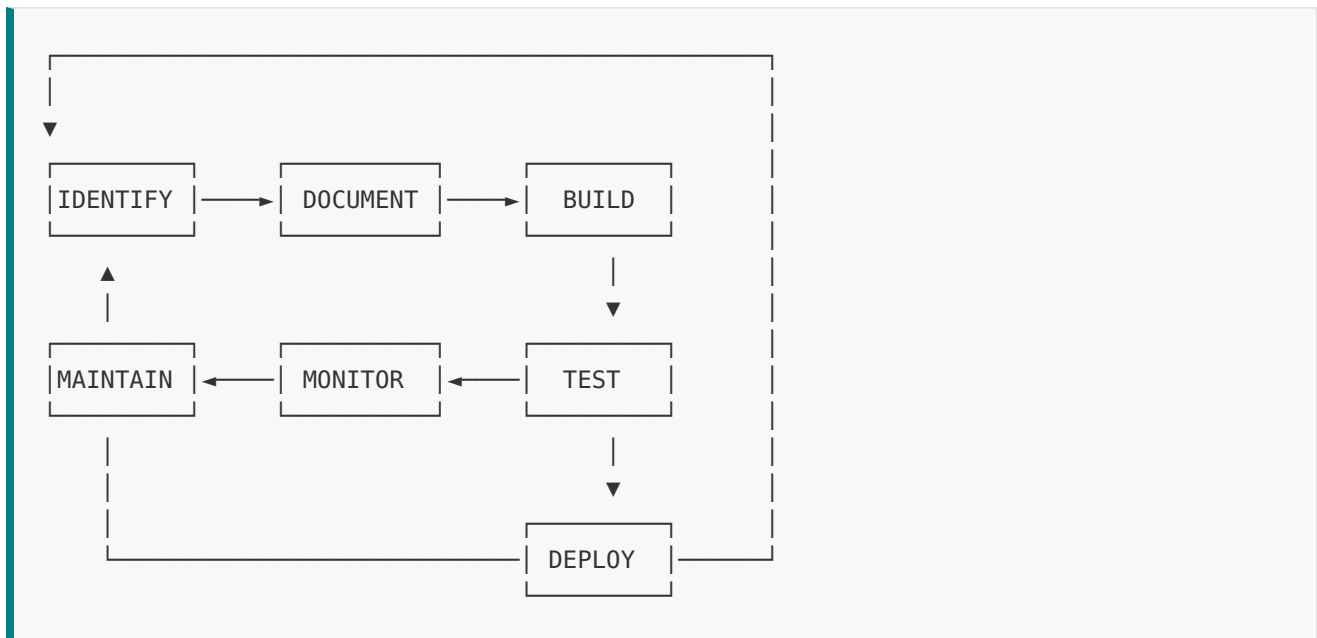
Phase	Key Questions
Identify	Is this worth automating? (Q1)
Document	Mini-Spec complete? (Q3)
Build	MVP defined? (Q4)
Test	Does it match manual results?
Deploy	Side-by-side complete?
Monitor	Any issues arising?
Maintain	Updates needed? (Q5)

Quick Reference Cards

Print these pages and keep at your desk

Card 1: Data Safety Checklist 🛡️

Before Sharing ANY Data with AI Tools:

#	Question	If Yes...
1	Does this contain real names, contact info, or IDs?	🛑 STOP — Use synthetic
2	Is this health-related with any HIPAA identifier?	🛑 STOP — Use Tier 1 or synthetic
3	Would you be uncomfortable if it appeared on a news website?	🛑 STOP — Redact or synthetic
4	Does your organization allow this tool for this data?	If No — Check policy first

Safe to proceed? ✅ Use appropriate tier.

Quick Synthetic Replacements:

Real	Synthetic
John Smith	Person_001
555-123-4567	555-000-0001
john@company.com	user001@example.com
123 Main St	100 Example St
SSN: 123-45-6789	SSN: 000-00-0001

Card 2: The Five Rules for AI 🤖

Rule	One-Liner
1. Never Trust Blindly	It's a draft, not a deliverable
2. Be Specific	Detail in = quality out
3. Share Constraints	AI doesn't know your environment
4. Iterate	First try is a starting point
5. You Decide	AI suggests, you approve

Good Prompt Formula:

```
I need to [specific task].

Context:
- My data looks like [describe structure]
- I'm using [tools/software]
- I can't [constraints]

Please [specific deliverable].
```

Remember:

AI is a junior assistant, not a magic wand.

Card 3: 5-Question Automation Playbook 🎯

Q#	Question	Quick Assessment
1	Is it worth automating?	Frequency × Time × Pain = ??? hrs/year saved
2	Is it safe?	No PHI, no auto-send, has fallback
3	Do I understand it?	Can write every step without guessing
4	What's my MVP?	Smallest piece that delivers value
5	Can I maintain it?	Have time, process is stable, documented

Decision:

- All Yes → **PROCEED**
- Need prep → **DEFER** (document, create fallback, etc.)
- Low value → **SKIP**

Card 4: Mini-Spec Sections 📋

Section	Core Question	Common Mistake
1. Purpose	What does this do and why?	Too vague
2. Trigger	How do I know when to start?	Assuming "I just know"
3. Inputs	What files/data do I need?	Missing locations
4. Outputs	What's the final deliverable?	Unclear "done" state
5. Process	What are the exact steps?	Skipping "obvious" ones
6. Assumptions	What must be true?	Not listing any
7. Edge Cases	What can go wrong?	Assuming nothing fails
8. Testing	How do I verify it works?	No test plan

The Test:

If you can't explain it precisely, you can't automate it reliably.

Card 5: Project Folder Structure 📁

```
Automation_Projects/
└── Project_[Name]/
    ├── input/      → Source files (read-only)
    ├── output/     → Generated results
    ├── archive/    → Old versions
    ├── scripts/    → Code files
    ├── docs/       → Mini-specs, notes
    └── README.txt  → How to run this
```

File Naming:

```
YYYY-MM-DD_description_tag_vN.ext
```

Examples:

- `2025-02-01_weekly-report_raw_v1.xlsx`

- `run_workflow_v3.py`

Card 6: AI Tool Tiers 🔧

Tier	Type	When to Use	Data Rules
1	Organizational (Copilot)	Real work data	If org-approved
2	Public AI (ChatGPT, Claude)	Learning, generic help	Synthetic only
3	Local AI (GPT4All, Ollama)	Sensitive experiments	Data stays local

Decision Tree:

1. Does it involve real sensitive data? → Use Tier 1 (if available) or Synthetic + Tier 2

2. Just learning or generic help? → Tier 2 is fine

3. No org tool but need sensitive? → Consider Tier 3 or stay manual

Card 7: Email Automation Safety ✉️

The Four Absolute Rules:

#	Rule	Why
1	Never auto-send without human review	One wrong send = chaos
2	Don't auto-respond to sensitive topics	HR, legal, medical need judgment
3	Don't process PHI/PII without encryption	Same rules as all data
4	Don't auto-delete	Moving is fine; deletion is forever

Safe Patterns:
- ✅ Auto-sort to folders
- ✅ Flag for review

- ✅ Create summaries (you review)
- ✅ Draft responses (you send)
- ❌ Auto-send anything
- ❌ Auto-delete anything

Card 8: Workflow Selection Criteria 📊

Five Criteria for First Project:

Criterion	Ideal	Avoid
Frequency	Weekly or daily	Once a year
Time	15-30 minutes	Under 5 min or over 60
Risk	Low (internal reports)	High (money, HR, clinical)
Understanding	Crystal clear	"I figure it out each time"
I/O Clarity	"Starts here, ends here"	"It depends"

Scoring Guide:
Score each 1-5, total out of 25. Pick the highest scorer.

Tiebreaker: Which one annoys you most? That annoyance is fuel.

How to Use These Cards

1. Print on cardstock or regular paper

2. Cut along the section breaks (or keep as pages)

3. Laminate if possible (optional but helpful)

4. Post near your monitor or keep in desk drawer

5. Reference whenever you're working with AI or automation

Appendix

Glossary of Terms

Term	Definition
Automation	Using technology to perform tasks with minimal human intervention
BAA	Business Associate Agreement — contract ensuring data protection compliance
Edge Case	An unusual situation that might cause your process to fail
Hallucination	When AI generates plausible-sounding but incorrect information
HIPAA	Health Insurance Portability and Accountability Act — US healthcare privacy law
Iteration	The process of refining something through repeated cycles of feedback
Local AI	AI models that run on your computer, not in the cloud
Mini-Spec	A concise document describing a workflow in precise detail
MVP	Minimum Viable Product — the smallest version that delivers value
PHI	Protected Health Information — health data tied to an individual
PII	Personally Identifiable Information — data that can identify someone
Power Query	Excel tool for importing and transforming data
Python	A programming language designed to be readable and beginner-friendly
Redaction	Removing or replacing sensitive information from data
Shadow System	Informal tools/processes created outside official IT systems
Synthetic Data	Fake data with the same structure as real data, used for testing
Tier 1/2/3 Tools	Classification of AI tools by data safety level
VS Code	Visual Studio Code — a code editor made by Microsoft
Workflow	A sequence of steps to accomplish a specific task

Episode Reference Guide

Ep	Title	Key Takeaway
0	Why I Made This Series	"The upgrade is earned, not given"
1	Why Your World Is Different	Your constraints are real; generic tutorials don't work for you
2	Shadow Systems	You're already an architect
3	AI as Your Junior Assistant	AI needs supervision; follow the Five Rules
4	Safety First ★	Know what data never leaves your network
5	Your AI Toolkit	Three tiers of tools; pick the right one for your data
6	Setting Up Your Workbench	Python + VS Code = your automation toolkit
7	Organizing Your Files	Structure enables repeatability
8	Choose Your First Workflow	Five criteria; scoring matrix
9	Mini-Spec ★★	8-section template transforms how you document
10	Build Your First Automation	Two paths; careful rollout
11	Email Automation	Four absolute rules; safe patterns only
12	Your Automation Playbook ★★	5-Question framework for any future project

Resource Links

Episode 6: Installation

Resource	URL
Python Download	python.org/downloads
VS Code Download	code.visualstudio.com
Python Extension	Search "Python" in VS Code Extensions

AI Tools (Tier 2)

Tool	URL	Notes
ChatGPT	chat.openai.com	General purpose, widely used
Claude	claude.ai	Strong reasoning, longer context
Google Gemini	gemini.google.com	Integrated with Google services

Local AI Tools (Tier 3)

Tool	URL	Notes
GPT4All	gpt4all.io	Beginner-friendly GUI
LM Studio	lmstudio.ai	Good for experimenting with models
Ollama	ollama.ai	Command-line focused

Synthetic Data Generation

Tool	URL	Notes
Mockaroo	mockaroo.com	Generate realistic fake data
Faker (Python)	pypi.org/project/Faker	Library for generating fake data

Learning Resources

Resource	URL	Notes
Python Tutorial	python.org/tutorial	Official beginner guide
Excel Power Query	Microsoft Learn	Search "Power Query"

Troubleshooting Quick Reference

Python Installation

Problem	Solution
"python is not recognized"	Reinstall Python with "Add to PATH" checked
"pip is not recognized"	Same as above — reinstall with PATH
Wrong Python version shows	Uninstall old versions; install 3.12 fresh

VS Code

Problem	Solution
Python not recognized	Install Python extension; restart VS Code
Can't find terminal	View → Terminal (or Ctrl+`)
Code doesn't run	Make sure file is saved (.py extension)

Excel/Python Scripts

Problem	Solution
"No module named openpyxl"	Run `pip install openpyxl`
"File not found"	Check file path; verify file exists in expected folder
"Permission denied"	Close the Excel file if it's open

AI Tools

Problem	Solution
AI gives wrong answer	Be more specific; provide more context
AI invents things	Verify facts; don't trust code without testing
AI doesn't understand context	Re-explain your situation; include constraints

Your Automation Portfolio

Track all your automation projects in one place

#	Project Name	Status	Maturity	Notes
1		☐ Active ☐ Paused ☐ Retired	1 2 3 4	
2		☐ Active ☐ Paused ☐ Retired	1 2 3 4	
3		☐ Active ☐ Paused ☐ Retired	1 2 3 4	
4		☐ Active ☐ Paused ☐ Retired	1 2 3 4	
5		☐ Active ☐ Paused ☐ Retired	1 2 3 4	
6		☐ Active ☐ Paused ☐ Retired	1 2 3 4	

Next Steps

After Completing This Series:

1. Keep using the 5-Question Playbook for every automation decision
2. Maintain your Friction Log to identify future opportunities
3. Level up your first automation from Level 2 to Level 3
4. Share your success with colleagues who face similar challenges
5. Stay connected with hitit.ai for advanced content

Continuing Your Learning:

If You Want To...	Explore...
Go deeper with Python	Official Python tutorial; Automate the Boring Stuff book
Master Excel automation	Power Query training; VBA basics
Learn about scheduling	Windows Task Scheduler; cron (Mac/Linux)
Build web interfaces	Streamlit; Flask basics
Connect to databases	SQLite with Python; SQL basics

Feedback & Community

Share Your Experience

Your journey matters. Consider:
- What was your first successful automation?
- What challenges did you overcome?
- What would you tell someone just starting?

Connect with hitit.ai

Channel	Purpose
Website	hitit.ai
Updates	Subscribe for advanced content
Feedback	Help improve future materials

Completion Certificate

I have completed the AI for Knowledge Workers Starter Kit

Milestone	Date Completed
Watched all 12 episodes	
Completed all worksheets	
Built my first automation	
Applied the 5-Question Playbook	

My biggest takeaway:

My first automation:

Field	Details
Workflow name	
Time saved per run	_____ minutes
Frequency	
Annual hours saved	_____ hours

My next automation target:

Signed: ____ *Date:* ____

🎉 **Congratulations on completing the Starter Kit.**

You are now a Workflow Automation Architect.

AI for Knowledge Workers — Complete Starter Kit

hitit.ai — AI Education for the Thoughtful Mind