



# AI Foundations & Policy Compliance

AI Tools for Operations Leaders

# Personal Introduction

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Regional Manager

- +15y Progressive Leadership Experience
- Regional Leadership Management
- Lean Six Sigma Black Belt
- Expert in Cost and Turnaround Performance
- MBA University of Michigan
- Barbecue Expert

# Today's Agenda

Why AI Matters

Tesla AI Policy

Introduction to Bottle Rocket

Prompt Engineering Basics AI

Models & Tesla Agents Iterate

Verify & Improve

01

# Why AI Matters for Operations

2024

# 72% The Shift Is Already Happening

Of organizations have already deployed AI in at least one business function — and **supply chain leads adoption**. The question isn't if your competitors are using AI. It's how far ahead they already are.

McKinsey Global Survey on AI, 2024

## COMPANIES WAITING

**2.5×** more likely to fall behind on operational efficiency within 18 months  
Deloitte Digital Transformation Study

**67%** of leaders who delayed AI adoption reported talent retention issues  
LinkedIn Workforce Report, 2024

**\$4.2M** average cost of delayed AI implementation per year in missed productivity  
Accenture Technology Vision

## COMPANIES LEADING

**40%** reduction in time spent on routine reporting and data analysis tasks  
Harvard Business Review, 2024

**3.2×** higher employee satisfaction when AI handles tedious work  
MIT Sloan / BCG Research

**23%** improvement in supply chain decision speed — catching issues earlier  
Gartner Supply Chain Survey

**Bottom line:** Tesla's culture is built on Speed and Excellence. AI is how we **multiply both**.

# 60% Where Does Your Time Actually Go?

Of a manager's week is spent on tasks that **don't require human judgment** — data gathering, formatting reports, writing routine communications, and chasing information across systems.

Microsoft Work Trend Index, 2024

## TIME DRAINS (REPETITIVE)

11  
hrs

per week spent on email — reading, writing, sorting, and searching for buried info

McKinsey Global Institute

8 hrs

per week gathering data from multiple systems and formatting into reports

Forrester Research

5 hrs

per week on status updates, meeting prep, and predictable documentation

Asana Anatomy of Work Index

## HIGH-VALUE WORK (WHAT YOU'RE HIRED FOR)

Strategic

Long-term planning, process improvements, cost optimization — the work that drives your 20% improvement goals

Leadership

Coaching your team, handling exceptions, making judgment calls that only you can make

Innovation

Identifying new opportunities, building relationships, solving unsolved problems

**The math is simple:** If AI saves you 7.5 hours per week, that's **390 hours per year** — nearly 10 full work weeks redirected to what actually matters.

02

# **Tesla AI Policy Deep Dive**

00:00

# Three Tiers of AI Tools at Tesla

## APPROVED

Tesla Data OK

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Chat.BottleRocket ([go.tesla.com/chat](https://go.tesla.com/chat))

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IT Assist ([it.bottlerocket.tesla.com](https://it.bottlerocket.tesla.com))

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Employee Assist ([hr.bottlerocket.tesla.com](https://hr.bottlerocket.tesla.com))

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Energy Chats ([energy.bottlerocket.tesla.com](https://energy.bottlerocket.tesla.com))

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Nabu RAG Agents  
([nabu.bottlerocket.tesla.com](https://nabu.bottlerocket.tesla.com))

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Nova ([nova.tesla.com](https://nova.tesla.com))

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M365 Copilot Chat (corporate link only)

## CONDITIONAL

NO Tesla Data

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GitHub Copilot (code only, no Tesla data)

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GitHub Copilot CLI

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Power Automate AI (no OpenAI connector)

## PROHIBITED

Never for Work

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ChatGPT, Claude.ai, Gemini web

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Perplexity, Grok via X/xAI

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Apple Intelligence (corp devices)

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AI meeting transcription

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AI wearables (Ray-Ban Meta, etc.)

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DeepSeek (China-hosted)



# Approved AI Tools

Source: Tesla Confluence — Approved Software > AI Tools (InfoSec)

https://go.tesla.com/aitools - If an AI tool is not explicitly approved, consider it not allowed for use.

Please review the AI Policy to ensure you are up to date with policy requirements. Tesla Data Classification and Management Policy. <https://go.tesla.com/datapolicy>

**What is Tesla Data? For AI Purposes, any data that is not publicly available outside Tesla. Remember you have signed a Non Disclosure Agreement and agreed to protect Tesla Data.**

Tesla Approved Tools	Tesla Data Allowed?	Vehicle Software	Description	Comments
Bottle Rocket	Yes	✓	Tesla Approved general purpose AI chatbot. All Models in Bottle Rocket are approved for use with Tesla Data via chat and API.	<a href="https://go.tesla.cc">https://go.tesla.cc</a>
IT Assist Bot	Yes	✓	An IT-specific instance of Bottle Rocket for IT related assistance.	<a href="https://it.bottlerocket.com">https://it.bottlerocket.com</a>
Employee Assist	Yes	✓	An HR-specific instance of Bottle Rocket for HR related assistance.	<a href="https://hr.bottlerocket.com">https://hr.bottlerocket.com</a>
Inference as a Service (API Access)	Yes	✓	Inferencing as a service for teams that want to control their entire implementation stack end to end. All models provided via Bottler Rocket are approved for use with Tesla Data. <b>(NOTE: This requires ARB approval.)</b> Tesla-Hosted Models: (All on-prem models are offered unquantized at full resolution unless otherwise noted)	<a href="https://go.tesla.cc">https://go.tesla.cc</a>
<b>On-Premises Models a/o Jan 2026</b>  On-Prem Models <ul style="list-style-type: none"> <li>LlamaGuard3-8B</li> <li>Meta Llama-3.1-405B-Instruct</li> <li>Meta Llama-3.1-70B-Instruct</li> <li>Meta Llama 3.2-90B</li> <li>openai/gpt-oss-20b</li> <li>openai/gpt-oss-120b</li> <li>Qwen2.5-72B-Instruct</li> <li>Qwen/Qwen2.5-VL-7B-Instruct</li> <li>Qwen3-30B-A3B</li> <li>Qwen3-30B-A3B-Instruct</li> <li>Qwen-235B-A22B</li> <li>Qwen-235B-A22B-Instruct</li> <li>Qwen3-Omni</li> <li>Qwen3-Next-80B</li> <li>OpenGVLab/InternVL3-78B</li> <li>mistralai/Devstral-Small-2505</li> <li>nvidia/NVIDIA-Nemotron-3-Nano-30B-A3B-BF16</li> </ul>				
<b>Commercial Models</b> <ul style="list-style-type: none"> <li>Grok 2 Vision</li> <li>Grok 3 Mini</li> <li>Grok 3</li> <li>Grok 3 Vision</li> <li>Grok 4</li> <li>Grok 4 Ext Reasoning</li> </ul>				

If not explicitly approved, it is **NOT** allowed.

## ANNOTATIONS

- 1 Key rule: Not approved = not allowed
- 2 Tesla Data = anything not public
- 3 Bottle Rocket — Tesla Data OK
- 4 IT Assist — IT help desk bot
- 5 Employee Assist — HR bot

## YOUR 3 SAFE TOOLS

Bottle Rocket  
IT Assist  
Employee Assist

# Conditional & Restricted Tools

Same policy page — scroll down for the tricky rules

TESLA Spaces People Questions Calendars Analytics Document Management Collections Create Access FAQ I need access				
<ul style="list-style-type: none"> <li>Information Security: General</li> <li>Approved Software               <ul style="list-style-type: none"> <li>Blocked Programs and URLs</li> <li>Software Authentication Set</li> <li>Baseline Compliance Runbook</li> </ul> </li> <li>CrowdStrike Falcon</li> <li>Detection Engineering Support</li> <li>External Mobile CCTV Assessment</li> <li>External Reference: Troubleshooting</li> <li>Information Security: Detection</li> <li>Patching and Updates Guideline</li> <li>SDLC</li> <li>Security Ambassador Program</li> <li>Security Training (Archive)</li> <li>SentinelOne</li> <li>Web Security - Questionnaire</li> <li>Information Security: Policies &amp; I</li> <li>InfoSec Vulnerability Management</li> <li>Power Platform Governance and</li> <li>Purple Team Projects</li> <li>Risk Framework - Security</li> <li>Security considerations for the ir</li> <li>Security Research Projects</li> <li>Security Systems Engineering - E</li> <li>Software Approval Process</li> <li>Vehicle Product Security</li> <li>Content Formatting Templates</li> <li>Tesla Information Security Policies</li> <li>Graphviz Diagrams</li> <li>Iframe 3DU Test</li> <li>Amazon Linux Patching</li> </ul>	1	GitHub		<ul style="list-style-type: none"> <li>Are we hosting our entire code base in cloud? – No</li> <li>Is our code base or repo sent to cloud? – No</li> <li>Is GitHub Copilot using other Models for Code Completion and Chat Support – Yes</li> <li>Does it create any risk for IP? – No</li> <li>How no risk for IP if multiple models are used?               <ol style="list-style-type: none"> <li>1. All Models (OpenAI, Gemini, Claude) are hosted in GitHub Managed accounts within Azure Tenant.</li> <li>2. The Model Providers do not have access to the Inference Instances of GitHub where the models are hosted.</li> <li>3. Tesla or any client data is not used for Code Training.</li> <li>4. Hashed Prompt interactions are stored in Azure Tenants for 60days to support legal obligations/claims</li> <li>5. MCP use limited to approved Nova MCP tools.</li> </ol> </li> </ul> <p>NOTE: Copilot is a cloud subscription whereas we use GitHub Enterprise. Copilot cannot talk to our GitHub Enterprise for PR review.</p>
		Microsoft Copilot for GitHub CLI	Yes	Allowed for all GitHub users. MCP use limited to approved Nova MCP tools.
	2	Microsoft Copilot M365 - (Word, Excel, PowerPoint, Outlook, and Teams)	N/A	<ul style="list-style-type: none"> <li>There is a difference between Copilot M365 Chat and Copilot M365. <a href="#">Microsoft Copilot Chat vs. Copilot M365</a></li> <li><b>Copilot M365 is not available.</b></li> </ul>
	3	Microsoft 365 Copilot Chat and Copilot Windows application	Yes	<ul style="list-style-type: none"> <li>When logged in, data does not leave our tenant and is protected by Microsoft Enterprise Data Protection</li> <li>Data remains in our tenant and utilizes the same controls as existing Office applications.</li> <li>Make sure you use corporate link <a href="https://m365.cloud.microsoft.com/chat">https://m365.cloud.microsoft.com/chat</a></li> <li><b>Do not use <a href="https://copilot.microsoft.com">https://copilot.microsoft.com</a> which is a personal link.</b></li> </ul>
	4	Microsoft Teams Call Recording / Note Taking / Transcription	Please refer to the Global Meeting Recording Policy. (This includes approval for training process)	<ul style="list-style-type: none"> <li>The use of Teams features like recording or transcription must meet requirements of the <a href="#">Global Meeting Recording Policy</a>. (This includes approval for training process)</li> <li><b>Vendors are not allowed to use note taking/transcription</b> <ul style="list-style-type: none"> <li>Request vendors disable AI assistants / transcription during calls.</li> <li>Note taking and transcription with unapproved tools is prohibited by either party.</li> </ul> </li> </ul>
		Microsoft Teams Premium	Yes *	<ul style="list-style-type: none"> <li>Limited to users who host large volumes of meetings requiring notes due to additional monthly cost per user. Will require manager approval. Self Service expected in next couple weeks.</li> <li>The use of Teams features must meet requirements of the <a href="#">Global Meeting Recording Policy</a>.</li> <li><b>Not allowed for vendors/suppliers</b></li> </ul>
		Microsoft Power Automate	Yes	Use of Power automate AI functions are approved from infosec perspective, as data stays inside tenant. This does not

## ANNOTATIONS

- 1 **GitHub Copilot** — approved but NO Tesla code
- 2 **Copilot in Office** — M365 is NOT available
- 3 **M365 Chat** — OK but use *corporate link only*
- 4 **Teams Recording** — needs policy approval, vendors blocked

## COMMON MISTAKES

- Using [copilot.microsoft.com](https://copilot.microsoft.com) instead of [m365.cloud.microsoft.com](https://m365.cloud.microsoft.com/chat)
- Letting vendors record or transcribe calls

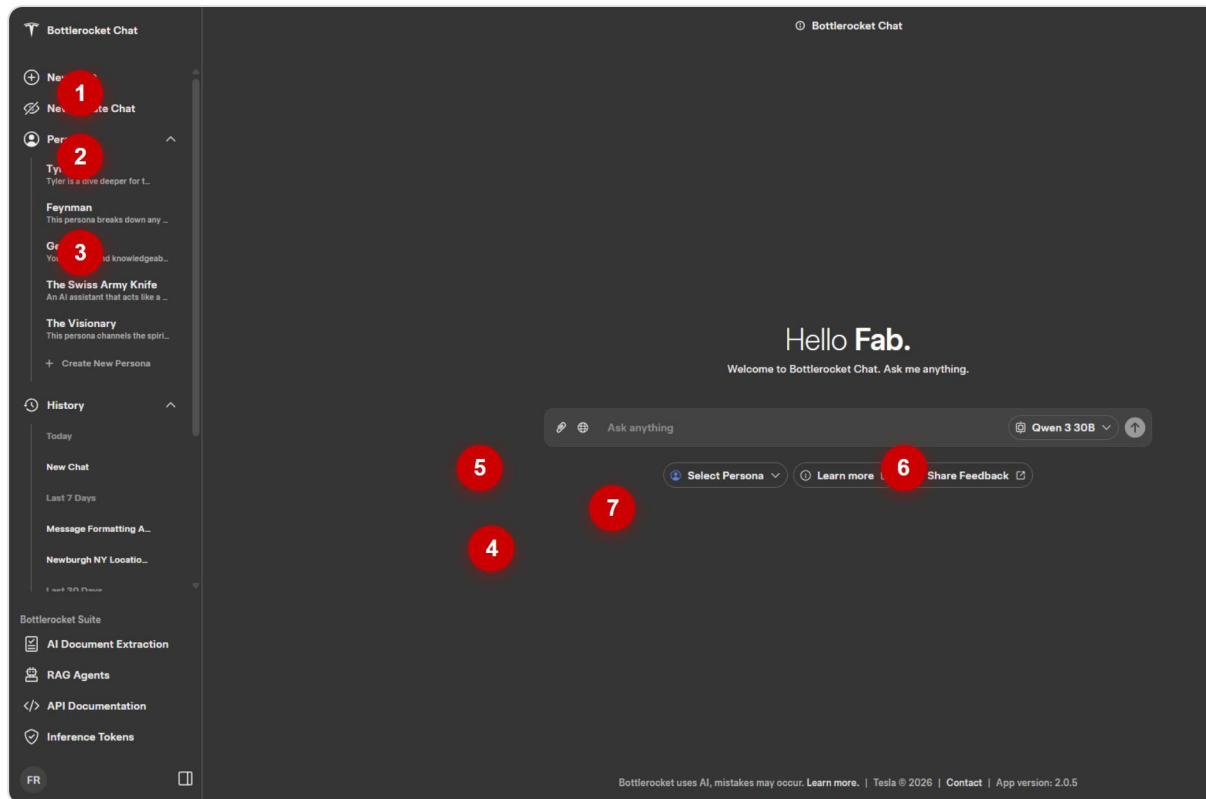
**When in doubt:** Use Bottle Rocket. It is always approved for Tesla Data.

03

# Introduction to Bottle Rocket

www.bottle-rocket.com

# Your AI Dashboard — Bottle Rocket



- 1 **New Chat** — Start fresh conversation
- 2 **Private Chat** — Not saved to history
- 3 **Personas** — Change AI personality
- 4 **File Upload** — Attach PDFs, data files
- 5 **Web Search** — Real-time info toggle
- 6 **Model Selector** — Choose AI model
- 7 **Select Persona** — Quick persona switch

All models inside BR are **approved for**  
**Tesla Data**

# Three Tiers of AI: Chatbot → Workflow → Agent

Not all AI is the same. Understanding the tiers helps you pick the right tool for the job.

## 1 AI Chatbot

*Answers questions by retrieving content*

Fetches information from a **known set** of documents or data. Matches your question to stored content and generates a response.

- Retrieves from documents (RAG)
- Matches query to content
- Generates formatted answer
- **Read-only** — cannot take action

### TESLA EXAMPLE

**Bottle Rocket Chat** — ask questions, get answers from AI models. **Nabu** agents with uploaded docs.

## 2 AI Workflow

*Answers questions by invoking systems*

Orchestrates data from **multiple sources** or services. Goes beyond static retrieval — calls APIs and combines results.

- Calls external APIs for live data
- Combines multiple data sources
- Computes or aggregates results
- **Read-only** — pulls data, doesn't change it

### TESLA EXAMPLE

**IT Assist / Employee Assist** — pulls from HR systems, knowledge bases, and ticketing to answer your question.

## 3 AI Agent

*Performs actions by invoking systems*

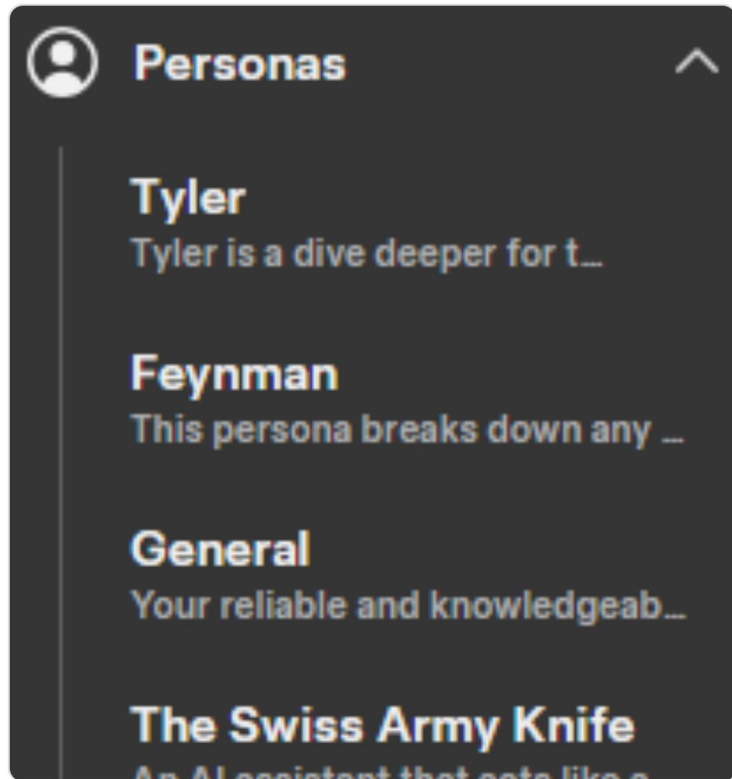
Autonomous entity that **executes tasks** and influences the environment. Makes decisions and acts on them.

- Perceives situation & decides actions
- Calls APIs to **read AND write**
- Automates workflows end-to-end
- Monitors outcomes, adjusts behavior

### TESLA EXAMPLE

**Future state** — an agent that monitors Order Monitor, auto-escalates stuck VOR orders, and reassigns pickers.

# Personas — Customize Your AI Assistant



Bottle Rocket — Personas sidebar



## Feynman

Explains complex topics in simple terms. Great for training materials and breaking down technical concepts.



## General

Balanced all-purpose assistant. Good default for everyday operations tasks.



## Swiss Army Knife

Multi-tool for diverse tasks: formatting, analysis, writing, brainstorming.



## The Visionary

Strategic thinking and big-picture analysis. Best for planning and initiative design.

[Create your own persona](#) with custom instructions — e.g., a “DC Operations Manager” with your site’s SOPs built in.

# 04

## Prompt Engineering Basics



# 50% Your Prompt Is Half the Equation

MIT researchers found that half of AI performance comes from the model — and the other half from **how you write your prompt**. The best prompters weren't engineers. They were people who expressed ideas clearly.

MIT Sloan School of Management, 2024

## WITHOUT PROMPT SKILLS

- 83%** hallucination rate — AI confidently makes up facts when given vague instructions  
Mount Sinai School of Medicine
- 78%** of AI project failures caused by poor human-AI communication, not bad technology  
Enterprise AI research, 2024
- 5.8×** performance variance — the same model gives wildly different answers depending on wording  
arXiv, Llama-2 study

## WITH PROMPT SKILLS

- 21%** hallucination rate — a 4× reduction just from writing clearer, structured prompts  
Mount Sinai School of Medicine
- 40%** higher quality output when users apply a structured prompting framework  
Harvard / BCG, 758 consultants
- 34%** productivity boost for beginners — new AI users gain the most from learning to prompt well  
Stanford / MIT, 5,000 workers

**Bottom line:** Bottle Rocket already has the best AI models. The gap between a frustrating AI experience and a powerful one is **your prompt**.



# The Prompt Formula: ROLE + CONTEXT + TASK + FORMAT

ROLE

+

CONTEXT

+

TASK

+

FORMAT

## ROLE

Tell the AI who to be

*"You are an experienced operations manager at a distribution center"*

## CONTEXT

Give background information

*"I manage the morning shift at Tampa DC with 45 associates"*

## TASK

State exactly what you need

*"Create a standup summary for today's meeting"*

## FORMAT

Specify the output structure

*"Bullet points, under 150 words, 3 sections"*

# Good Prompt vs. Bad Prompt

## Vague Prompt

Help me with standup prep

Generic, unfocused, not usable without heavy editing. Missing: role, context, specific task, format constraints.

## Structured Prompt

**ROLE:** Experienced ops manager at a Tesla DC.

**CONTEXT:** Tampa DC, morning shift, 42 associates, 2,847 orders yesterday, conveyor issue 2-4 PM.

**TASK:** Standup summary – yesterday's performance and today's priorities.

**FORMAT:** Bullets, under 150 words, 3 sections.

Specific, actionable, ready to use with minor edits.

*The same AI model produced both outputs. The difference is entirely in the prompt.*

# Choose Your Category

**CARD A****Email Drafts**

- Vendor late delivery
- Leadership update
- Team recognition
- Customer escalation

**CARD B****Meeting Prep**

- Safety meeting agenda
- 1:1 with supervisor
- Shift handoff debrief
- QBR talking points

**CARD C****Performance Summaries**

- Weekly metrics
- Incident report
- Shift handoff
- Regional highlight email

**CARD D****Analysis & Problem-Solving**

- Missed shipments
- Overtime spikes
- Dock door efficiency
- Retention brainstorm

# Tesla Employees Are Already Building AI Agents

## 5-Why Analysis Agent

### OPERATIONS

Guides structured root cause analysis for production issues

## Parts SOP Generator

### OPERATIONS

Generates standard operating procedures from parts documentation

## Watt Wizard

### ENERGY

Answers energy storage and battery technical questions

## SPARQ

### ENGINEERING

Spark plug analysis and quality inspection checks

## Megafactory 5S

### MANUFACTURING

5S audit assistance for factory floor operations

## Your Agent?

### YOUR DC

What repetitive task could AI handle for your team?

# Nabu — Build Your Own AI Agent

The screenshot shows the Nabu platform interface. At the top, there's a header with the Nabu logo and a navigation bar. Below the header, there's a welcome message and a search bar. The main content area displays a list of AI agents, each with a name, description, and status. The agents are listed in a table format with columns for Agent Name, Description, Updated At, and Created At. The agents are:

- 5-Why Analysis AI-Agent** (Live on Nova): \* Specialized agent for systematic root cause...
- SPARQ\_Smart Processing Agent\_for\_RAG-based Queries** (Live on Nova): A smart field assistant that instantly retrieves...
- Email automation Test Agent**: Respond to Emails and Quotes
- Workplace Health - Giga Texas**: Where employees can ask questions related t...
- Watt Wizard** (Live on Nova): Overview Name: WattWizard Role: AI Energy ...
- testbot**: I am just testing out what happens when I sel...
- Megafactory NPI Documents** (Review In Progress): Search of all NPI related documents
- Megafactory\_Lathrop\_5S** (Live on Nova): This AI agent helps to answer 5S related que...
- FS-fx-docs-agent**: Factory Software - FX docs agent
- Tesla GPT** (Live on Nova): Produces structured responses similar to cha...

At the bottom of the interface, there's a footer with the text: Tesla © 2026 | Contact us | App version: 2.1.1

- 1 Create Agent** — Start building in 1 click
- 2 Learn More** — Docs and tutorials
- 3 Search Agents** — Find existing agents
- 4 Agent List** — Live agents with status badges
- 5 Descriptions** — What each agent does

# 38+

agents built by Tesla employees  
No code required. Just markdown + prompts.

# The Prompt Progression — Same Data, 4 Prompts

*Same AI model. Same data. Only the prompt quality changes.*

- 1 Trainer opens 4 Nabu agents (Order Monitor Levels 1–4), all loaded with same 1,000-order dataset
- 2 Same question asked to all 4: “What are the most urgent orders I should worry about?”
- 3 Watch outputs side-by-side — Level 1 (generic) → Level 4 (expert with part numbers and actions)
- 4 Group discussion: What made the difference at each level?



**Key insight:** The AI model is the same. The data is the same. The ONLY variable is the quality of your instructions.

# The 4 Prompt Levels

## ACTIVITY C

### Level 1

Analyze the file.

#### The Lazy Prompt

3 words, zero guidance

### Level 2

You are a warehouse analyst. Look at the order data and tell me what's going on. Find any problems and give me a summary. Use bullet points.

#### Some Effort

### Level 3

**ROLE:** Operations analyst... **CONTEXT:** Order Monitor export, Hot Calls, VOR...  
**TASK:** Executive summary, flag urgent, identify problems, 3-5 recommendations...  
**FORMAT:** Headers, bullets, bold numbers

#### Good Structure (RCTF Framework)

### Level 4

Everything from Level 3 **PLUS:** 50+ field definitions, status lifecycle, pick location format, part groups, route types, analysis thresholds

#### Expert

*Same AI model. Same data. Only the prompt changes.*

## EXERCISE 3

# Design Your Agent on Nabu

- 1 Open **nabu.bottlerocket.tesla.com**
- 2 Browse published agents — note 5-Why Analysis and Watt Wizard as examples
- 3 Click “**Create New Agent**”
- 4 Name your agent: **[Your DC] + [Use Case]** (e.g., “Tampa Shift Handoff Agent”)
- 5 Write a system prompt using **ROLE + CONTEXT + TASK + FORMAT**
- 6 Upload one document to the knowledge base (an SOP, checklist, or template)
- 7 Test in the **Playground** with a sample query



### AGENT IDEAS

**Shift Handoff Agent** — Generates end-of-shift summaries

**New Hire Onboarding** — Answers associate FAQs

**Safety Incident Logger** — Structures incident reports

**Start simple:** One task, one document.  
You can improve it in Week 3.



## EXERCISE 6

# Iterate, Verify & Improve

## INSTRUCTIONS

- 1 Take your best prompt from Exercise 2
- 2 Review the output critically — what is not quite right?
- 3 Apply a verification technique (cross-reference a claim, check a number)
- 4 Use a follow-up prompt to improve (e.g., “Make this more concise”)
- 5 Bonus: Re-run with web search ON and compare accuracy

Don't rewrite the entire prompt — just tell the AI what to fix.  
Iteration is the skill that separates good AI users from great ones.

# Key Takeaways

**01** AI augments your expertise — it handles repetitive work while you focus on judgment and strategy

**02** Policy is non-negotiable — Tesla AI Policy is your guide

**03** ROLE + CONTEXT + TASK + FORMAT — the four-part formula transforms vague requests into actionable outputs

**04** Iterate, verify, and use personas — your first output is a draft, not a deliverable. Check facts, refine, then use.