

INTRO TO AI

A practical session on saving time with drafts, lookups, notes, and follow-ups.

Today: find one repeat task AI can make less annoying.

No robot takeover. Just better tools for humans.



HOW TO ACCESS AI + LLMS

Use AI through web, mobile apps, built-in work tools, or API automation — then choose the model that suits the task.



Web + app access

Browser chat, phone apps, desktop apps, voice and image inputs.



Work tools

Copilot, Google Workspace, CRM/helpdesk and document helpers.



API / automation

Connect forms, inboxes, workflow systems and repeat workflows.



ChatGPT / GPT

OpenAI all-rounder: drafts, ideas, analysis and general problem solving.

MODEL QUICK GUIDE

OpenAI

GPT / ChatGPT

Drafts • ideas • analysis

Google

Gemini

Web • Google • multimodal

Anthropic

Claude

Long docs • writing • summaries

Microsoft

Copilot

Office • Outlook • Teams • Excel

Choose access → choose model → ask clearly → check before using



TLDR;

**Access is the doorway;
the model is the engine.
Pick the tool for the
Work.**

WHY SHOULD WE CARE?

- Long threads, messy notes, admin, and repeated explanations keep stealing time from real work.

20

minutes
a day

minutes a day saved is real time back in your day — or off the clock.



Fast answers

Customers expect clear updates on the spot.



Less paperwork

Scope notes, checks, and follow-ups happen faster.



Quicker lookups

Docs, specs, and product details without tab chaos.



Better memory

The team captures what good looks like.

You trained to solve real problems — not to spend your best years fighting messy PDFs.

Workflow: notes/docs → AI draft → human check → send



TLDR;

Small daily admin wins add up fast across the team.

AI IN PLAIN ENGLISH

Think of AI as another tool in the kit.



Calculator

helps with numbers



Power drill

helps with physical work



AI assistant

helps with language, information, planning

**It is not magic.
It still needs human common sense.
Toolbelt, not autopilot.**

Workflow: notes/docs → AI draft → human check → send



TLDR;

**AI is a helper for
language, planning, and
sorting info.**

AI'S SWEET SPOT

Best for repetitive brain work around the Work — not the safety-critical final call.



Repetitive brain work

draft • summarise • compare • structure



Manuals + Docs

Quick practical takeaways



Templates

Checklists and repeatable admin



Site notes

Clean customer updates



Options

Compare scope, risks, next step

Workflow: notes/docs → AI draft → human check → send



TLDR;

Use AI for repeatable brain work, then check the result.

FRONTLINE TEAMS, WHERE AI HELPS



Explain issues, options, recommendations, and next steps in plain English.



Summarise supplier docs, policies, and requirements into a practical answer.



Check assumptions and missing details as a second-pass helper — not final authority.



Turn notes into scope, exclusions, handovers, and customer updates faster.



Create checklists, templates, and common troubleshooting guides.

Ask: Summarise the key points and draft a customer explanation without jargon.

Workflow: notes/docs → AI draft → human check → send



TLDR;

Frontline teams can turn rough notes into clearer customer updates.

CUSTOMER SUPPORT, WHERE AI HELPS

- Clear issue summaries, policy takeaways, and next-step options — without rewriting the same thing every day.



Notes + context

issue summaries and handover notes



Documents + policies

turn long instructions into quick takeaways



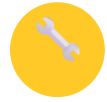
Follow-up

notes and recommended next actions



Customer explanation

status, next steps, timing, ownership



Troubleshooting

checklists for common repeat problems

Ask: Explain this issue simply, likely cause, and next-step options.

Workflow: notes/docs → AI draft → human check → send



TLDR;

Customer support teams can turn notes into simple next-step options.

OFFICE TEAM, WHERE AI HELPS

Fewer tabs. Fewer copy-paste marathons. Fewer “who promised what to whom?” moments.



Draft email replies

faster first pass



Call notes

turn into action lists



SOPs

first-pass process docs



Summarise threads

status, risks, next action



Follow-ups

polite, consistent reminders

Summarise this email chain into status, risks, and next action.

Workflow: notes/docs → AI draft → human check → send



TLDR;

Office work gets faster
when long threads
become clear actions.

AI IN REAL WORKFLOWS

Goal: remove friction, not replace people.

→ Work notes → customer-ready updates

→ Inbox threads → clear next actions

→ Details → cleaner first drafts

→ Supplier docs → practical takeaways

→ Enquiries → faster triage

→ Common questions → consistent replies

Start with the Works we already repeat: updates, triage, notes, summaries, and follow-ups.

Workflow: notes/docs → AI draft → human check → send



TLDR;

Start with real real workflows: quotes, notes, inboxes, and triage.

BEFORE AI VS AFTER AI

Same person. Same knowledge. Less stuffing around.

Before

finish work →
scribble notes →
dig through docs/manuals →
rewrite update →
send it late

admin grows after the work is done

After

dump notes into AI →
draft update →
quick summary →
missing bits to check

human checks and sends



Workflow: notes/docs → AI draft → human check → send



TLDR;

The win is faster drafts
with a human final
check.

COULD AI HELP HERE?

A quick test for annoying repeat work.

1

Do we do this often?

repeatable

2

Is it repetitive?

not one-off chaos

3

Notes, forms, emails, Docs, manuals, explanations?

language + information work

4

Does it slow handover, review, reporting, or updates?

friction hotspot

5

Do Good people keep wasting time here?

candidate for testing

Repeatable + annoying + time-consuming = worth testing

Workflow: notes/docs → AI draft → human check → send



TLDR;

If a task is repeatable and painful, it is worth testing.

AUTOMATION OPPORTUNITY CHECKLIST

Automate the repetitive admin around the work — not the human responsibility itself.



Good candidates

Reminders, quote follow-ups, Work updates, product lookups, site notes.



Also good

Compliance summaries, repeated explanations, troubleshooting flows, handover notes.



Bad candidates

Final safety calls, legal/financial judgement, risky decisions, or one-off weird Works.



Rule of thumb

Automate weekly admin friction — not responsibility.

Workflow: notes/docs → AI draft → human check → send



TLDR;

Automate admin friction, not human responsibility.

SAFETY + PRIVACY

Don't be that person.



Don't trust outputs blindly.



Don't paste sensitive info into random tools.



Don't fake knowledge you do not have.



Don't let AI send final customer comms without approved review.

Workflow: notes/docs → AI draft → human check → send

If you give AI chaos, it will confidently return deluxe chaos.



TLDR;

Privacy and human review are non-negotiable.

GOOD PROMPTS BEAT BAD PROMPTS

Better instructions get better output.



Bad

Write email



Better

Write a short friendly email to a customer explaining an issue, why it matters, and recommended next steps this week. Keep it simple and non-alarmist.

Prompt recipe

Task

Audience

Tone

Must include

Avoid

Workflow: notes/docs → AI draft → human check → send



TLDR;

Specific prompts beat vague prompts every time.

YOU'LL SPOT OPPORTUNITIES WE WON'T

Best ideas come from people doing the real work every day.

- We keep sending the same explanation.
- This form takes too long.
- We re-enter the same info in three places.
- We always chase the same missing details.

If you think “surely there’s a better way”, we want to hear it.

Workflow: notes/docs → AI draft → human check → send



TLDR;

The best automation ideas come from people doing the work.

Bring ideas to the workflow owner

Include the basics so the idea is easy to test.

TASK what the task is

OWNER who does it now

FREQUENCY how often it happens

PAIN what makes it painful

OUTCOME what good would look like

We do [task] [how often]. It takes about [time]. The annoying part is [pain]. I think AI or automation could help by [idea].

Workflow: notes/docs → AI draft → human check → send



TLDR;

A useful idea only needs
task, owner, frequency,
pain, outcome.

IF WE DO THIS RIGHT...

The win is not using AI. The win is getting work done better.

Better work, less friction



Faster internal workflows



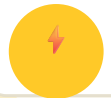
Better customer communication



Less time on repeat admin



More consistency across team responses



Better capture of team knowledge



More time for higher-value work

Workflow: notes/docs → AI draft → human check → send



TLDR;

Better work means less repeat admin and clearer communication.

LET'S BUILD THIS TOGETHER

Try it. Question it. Test boring tasks first. Share what works. Tell us what is painful.

→ Bring ideas to the workflow owner

→ No robot takeover. Just better tools for humans.

→ If it saves time, reduces friction, and helps us do better work, it's worth testing.

Workflow: notes/docs → AI draft → human check → send



TLDR;

**Test boring tasks first,
then keep what saves
time.**

OPTIONAL DISCUSSION PROMPTS

- What should AI fix first?
- What task wastes the most time each week?
- What customer explanation do we keep repeating?
- What regulation, spec, or product info is annoying to look up?
- What admin step should happen automatically after work is completed?
- Where are we double-handling information today?

Workflow: notes/docs → AI draft → human check → send



TLDR;

Use the questions to pick the first practical automation target.