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AI Productivity Playbook

Practical workflows, tool choices and output review

FA-0570 · 2 days

Agentic & Generative AI · AI for Leaders & Business · Automation, RPA & Power Platform

A two-day survey and selected hands-on workshop on AI-assisted documents, research, presentations, media, automation and repeatable professional workflows.

Introduction

This two-day course helps professionals select AI tools and build repeatable, reviewable workflows. It starts with AI literacy, context and prompting, then explores documents, research, presentations, creative media, workflow automation and agents.

The source combines broad tool coverage with an explicit two-day description; the course uses that format rather than promising all topics in one day. Core exercises focus on selected document, research and presentation/workflow tasks. Other tools and advanced applications are comparisons or demonstrations, subject to time and account access.

No programming background is required. Command-line and local-model examples are optional demonstrations. Financial, contractual and compliance-related outputs remain drafts for appropriate professional review; exercises use illustrative, non-confidential information.

Learning outcomes

The course teaches participants to:

- Explain practical AI capabilities, failure modes and verification needs.
- Compare tool categories using task fit, cost, data handling, access and integration criteria.
- Write and refine prompts/context for selected writing, summary and planning tasks.
- Review sourced research and document extraction for accuracy and omissions.
- Prepare a selected presentation or creative output and inspect quality and rights questions.
- Describe bounded agent/workflow automation, permissions and human approval points.

- Recognise local/CLI versus hosted-tool trade-offs.
- Design a small personal workflow and assess time, quality and rework using evidence.

Prerequisites

- Comfort using a computer, browser based applications, and standard office tools.
- Familiarity with documents, spreadsheets, presentations, and email.
- No programming background required.
- Access to at least one major AI assistant is recommended but not mandatory.

A laptop for selected exercises; confirm available accounts, licences, credits and file limits before delivery. Optional local/CLI demonstrations require a suitable prepared environment, not independent terminal proficiency.

Training outline

1. Day 1 — AI literacy, prompting and knowledge workflows

Foundations of Artificial Intelligence

What artificial intelligence means in practical terms

- Narrow AI versus general capability
- Generative AI versus analytical and rules based systems

How modern AI systems work conceptually

- Training data and learned patterns
- Tokens, context, and why phrasing matters
- Why AI can sound confident and still be wrong

Core building blocks explained simply

- Large language models as prediction engines
- Embeddings as representations of meaning
- Retrieval-augmented generation: use source context and still check evidence.
- Tools and actions as extensions beyond text

Strengths and limitations

- Pattern recognition at scale
- Creativity versus precision
- Situations where human judgment must lead

Reliability and trust

- Hallucinations and fabrication
- Incomplete context and hidden assumptions
- Over summarization and loss of nuance

Professional usage mindset

- AI as an assistant, not an authority or accountable human colleague.
- Review, verification, and accountability habits

The AI Landscape and Ecosystem

Major categories of AI tools

- Conversational assistants
- Research and search driven systems
- Office suite copilots
- Agentic and task execution systems
- Creative and generative media tools
- Automation and workflow platforms
- Local and command line driven tools

Where AI appears in daily work

- Browsers and search
- Desktop and operating systems
- Mobile devices
- Embedded inside enterprise platforms

Evaluating tools for professional use

- Accuracy and consistency
- Transparency and traceability
- File and data handling capabilities
- Privacy and compliance considerations
- Integration with existing workflows
- Cost models and licensing realities

The shift toward integrated AI environments

- AI embedded directly into documents, meetings, and systems
- Cross-application context only where integrations and permissions support it.
- AI as a layer rather than a destination

Prompting and Context Design for Productivity

Prompt structure to test and refine for the chosen model/task

- Role definition
- Objective clarity
- Context and constraints
- Output format specification
- Quality criteria and validation checks

Prompting patterns for everyday work

- Brainstorming and ideation
- Drafting structured documents
- Editing, rewriting, and tone adjustment
- Summarization for decisions and actions
- Planning, outlining, and sequencing work

Iterative collaboration with AI

- Ask first workflows
- Critique and revise loops
- Multiple option generation
- Comparative evaluation

Building a personal prompt system

- Reusable prompt templates
- Task specific prompt libraries
- Prompt adaptation for different audiences

Conversational and General Purpose AI Assistants

Capabilities and use cases of leading assistants

- Drafting and editing written communication
- Analyzing documents and reports
- Supporting decision making
- Acting as a thinking partner

ChatGPT and ChatGPT Work, where available

- Selected text, file, image and voice capabilities subject to account/platform access.
- Long form drafting and refinement workflows
- Personal productivity and planning use cases

Google Gemini

- Search-grounded assistance where supported; inspect sources and accuracy.
- Research oriented workflows
- Deep analysis and exploration patterns

Microsoft Copilot ecosystem

- Copilot chat versus application embedded copilots
- Word, Excel, PowerPoint, Outlook, and Teams usage patterns
- Organisational grounding subject to licences, configuration and existing access permissions.

Anthropic Claude

- Document analysis within supported file/context limits.
- Structured writing and analysis

Meta AI assistants

- Messaging based assistance
- Lightweight everyday queries

Choosing the right assistant for the task

- Creativity versus precision
- Speed versus depth
- Context length and document handling

Research, Knowledge, and Document Intelligence Tools

Research first AI systems

- Source grounded answers
- Citation driven exploration

Research notebooks and knowledge bases

Gemini Notebook (formerly NotebookLM): source-grounded workflows where available.

- Working with trusted sources
- Asking questions of your own documents
- Generating briefs, FAQs, and summaries

AI inside knowledge management platforms

- Notion AI
- Turning notes into structured knowledge
- Project and decision documentation

Document processing and understanding

- Ingesting PDFs, scans, and reports
- Extracting tables, key facts, and obligations
- Draft contract/policy summaries and questions for specialist review.

- Potential compliance/risk issues for verification, not an automated compliance determination.

2. Day 2 — Agents, content, automation and a personal workflow

Agentic AI and Task Execution Systems

What agentic AI means in practice

- Planning steps toward a goal
- Executing across tools
- Monitoring progress and adjusting

Manus and selected task-execution tools

- Multi-step task execution in a bounded environment with reviewed outputs.
- Research to output pipelines
- Selected presentation workflows where supported.
- Multi document synthesis
- Operational task delegation

Agent patterns for professional work

- Research agents
- Reporting and analysis agents
- Content production agents
- Operations and administration agents

Guardrails for agentic systems

- Human approval checkpoints
- Scope limitation
- Auditability and traceability

Presentation and Content Creation at Scale

AI assisted presentation workflows

- Outline to narrative development
- Slide structure and flow
- Speaker notes and talking points

Advanced presentation generation

Selected agent-assisted deck creation, such as available Manus workflows.

- Ingesting briefs, reports, and data

- Generating structured slide stories
- Iterative refinement cycles

Office suite based presentation support

- Microsoft PowerPoint with Copilot
- Available AI-assisted Slides workflows; confirm account features.

Quality control for presentations

- Message hierarchy
- Audience alignment
- Visual density and clarity

Generative AI Beyond Text

Image generation for professional use

- Marketing visuals
- Concept imagery
- Presentation graphics

Design and branding tools

Canva AI

- Selected design-generation workflows where available.
- Brand kit consistency
- Social and marketing asset generation

Website-builder demonstrations without coding

- AI website builders
- Landing page generation
- Content structure and copy generation

Video and audio generation

- Explainer videos
- Voiceovers and narration
- Training and onboarding materials

Responsible use of generative media

- Brand alignment
- Accuracy and claims
- Consent, authorised assets, usage terms and synthetic-media transparency where relevant.

Automation Platforms and AI Driven Workflows

Automation fundamentals

- Triggers, actions, and conditions
- Human in the loop design

Microsoft Power Platform

- Power Automate with AI models
- Document processing flows
- Email, forms, and approvals automation

Available AI model/service integration capabilities

- Understand the selected platform's supported model management and access controls.
- Connecting AI services to workflows

Cross system automation use cases

- Document intake to summary
- Meeting notes to task creation
- Reporting pipelines

Governance and safety

- Permissions
- Error handling
- Monitoring outcomes

Command Line and Keyboard Driven AI Tools

Understanding CLI style AI interaction

- Speed focused workflows
- Minimal interface environments

Gemini CLI: optional prepared demonstration

- Text analysis and transformation
- Selected non-interactive/batch examples with scoped permissions.

Local-model environments and their limits

- Ollama
- Running models locally
- Local inference and privacy considerations: local execution alone does not secure all files or integrations.
- Offline inference only with a suitable downloaded model and a workflow that does not call cloud services.

When command line tools make sense

- High volume text processing
- Sensitive-data requirements: assess every connected service, local environment and policy before use.
- Power user productivity habits

AI for Finance, Accounting, and Operations

AI assisted financial workflows

- Invoice processing
- Expense categorization
- Financial summaries and reports

Agentic accounting assistance

- Illustrative operational-finance assistance using an available agent, with checks.
- Cross system data synthesis
- Audit-preparation drafts, not audit evidence or conclusions.

Integration with automation platforms

- Power Automate financial workflows
- AI driven document extraction

Risk and accuracy considerations

- Verify calculations, source data, extracted fields and professional assumptions.
- Human oversight checkpoints

Building a Personal AI Productivity System

Designing daily AI workflows

- Email and communication
- Meetings and follow ups
- Document creation

Weekly and monthly workflows

- Planning and prioritization
- Reporting and updates
- Retrospectives and reviews

Tool stack design

- Primary assistant
- Research and document tools
- Automation layer
- Creative generation tools

Measuring productivity impact

- Time saved
- Quality improvements
- Reduced rework and friction

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