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Understanding AI and Tools

Practical concepts, tool evaluation and a bounded pilot for analysts

FA-0707 · 1 day

AI for Leaders & Business · Agentic & Generative AI

Introduction

Build a practical understanding of AI and assess where conversational, source-grounded and agentic tools can help everyday analytical work. This introductory day combines concept explanations, selected demonstrations and a small pilot-planning exercise.

Compare capabilities, data access, reliability, cost and human oversight rather than assuming that every tool or subscription offers the same features. Examples use approved sample data; no coding or production deployment is required.

Learning outcomes

- Distinguish rule-based systems, machine learning, generative models and agentic workflows.
- Explain LLM training, adaptation and inference at an introductory level, including uncertainty and hallucination.
- Compare conversational assistants, Power Platform AI capabilities, agentic tools and source-grounded notebook assistants.
- Evaluate a proposed use case against accuracy, permissions, privacy, integration and cost constraints.
- Draft a bounded pilot with success measures, human review and stop conditions.

Prerequisites

- Comfort with business analysis, reporting or everyday office software.
- Basic familiarity with cloud applications; no programming or machine-learning background required.
- Access to the approved demonstration tools where available; account, licence and administrator restrictions are checked before practical work.

Training outline

1. Module 1 — AI foundations and practical limits

- Rule-based systems versus supervised, unsupervised and reinforcement learning; neural networks and deep learning in context.
- LLMs: an accessible overview of model architecture, training, fine-tuning and inference; fine-tuning is discussed conceptually, not promised as a hands-on service.
- Generative, predictive, prescriptive and conversational applications; distinguish an assistant response from an agent performing a sequence of actions.
- Potential help with routine tasks and insight generation; examine bias, hallucination, missing context and over-reliance.

2. Module 2 — Agents, tools and MCP

- Observe, plan, act and evaluate: trace a bounded multi-step workflow and identify the human approval points.
- Tool orchestration and Model Context Protocol: connecting an AI application to permitted data and tools through an open protocol.
- Interoperability does not grant data access or guarantee trustworthy actions; review authentication, permissions, auditability and action limits.

3. Module 3 — Compare AI tool categories

- ChatGPT for drafting, summarisation, questions and selected data or code assistance; check outputs against supplied evidence.
- Connected apps and plugins can add tools and reusable workflows, subject to account and workspace permissions; distinguish these end-user capabilities from developer API tool calling.
- Microsoft Power Platform: distinguish AI Builder, Copilot capabilities in individual products and Copilot Studio rather than treating them as one universal AI hub.
- Agentic assistants, including Manus as a comparison example: evaluate task scope, reliability and supervision without assuming a particular internal multi-agent architecture.
- Source-grounded notebook assistants from Google, including Gemini Notebook: use supported documents and web sources, follow citations and compare generated summaries with the originals. Public YouTube sources require captions; arbitrary video ingestion is not assumed.

4. Module 4 — Guided tool exploration

- Use two representative tasks, such as a document brief and a small reporting question, to compare available tools.

- Observe Power Platform automation or application examples and discuss connectors, setup, governance and feature availability.
- Refine a prompt, inspect an answer and identify where the assistant needs better context or a reliable source.
- Review an agentic workflow demonstration and a source-grounded research brief; record unsupported statements, missed evidence and supervision needs.
- Broader product comparisons are demonstrations or discussion, not a promise of hands-on accounts for every platform.

5. Module 5 — Plan a useful, controlled pilot

- Identify opportunities in data preparation, report summaries, exploratory insight and scenario narratives; separate drafting from validated analytical conclusions.
- Select a tool using ease of use, connectivity, information protection, cost and scale considerations.
- Assess privacy, accuracy, bias, auditability and change-management requirements; assign an accountable human reviewer.
- Define one objective, approved inputs, roles, success measures, failure conditions and a short evaluation period.
- Choose one experiment for the next 30 days and identify the official documentation needed to keep its assumptions current.

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