



# **The AI Workflow Catalyst**

**Your Personalized AI Integration Plan: **Part Two****

**Business-building Toolkit Session**

**Ed Gandia, High-Income Business Writing**



# Use case example #5: Research





# How AI can help:

AI can assist in the research process by efficiently finding and gathering information from various sources. It uses natural language processing and machine learning algorithms to quickly analyze and synthesize large volumes of data, providing writers with relevant and up-to-date information tailored to their specific needs.

# Some examples of AI's application here:

- Searching for and compiling the latest industry statistics and trends for a white paper or report.
- Gathering background information and key facts for an article or blog post.
- Identifying and summarizing relevant studies, reports, and articles for a comprehensive literature review.
- Monitoring news sources and social media for real-time updates on a specific topic.



# Benefits of incorporating AI here:

- **Efficiency:** AI tools can quickly gather and process large amounts of information, saving writers significant time in the research phase.
- **Accuracy:** Ensures that the information gathered is current and accurate, reducing the risk of relying on outdated or incorrect sources.
- **Comprehensiveness:** Provides a broad view of the topic by pulling information from diverse sources, offering a well-rounded perspective.
- **Focus:** Allows writers to focus on analyzing and synthesizing the information rather than spending extensive time on manual research.
- **Relevance:** Tailors the gathered information to the writer's specific needs and context, ensuring relevance and usefulness.



# Scenario:

**Sarah is a freelance content writer working on a comprehensive article for an industry magazine about how accounting firms in the US are deploying new technology. She needs research that explains the adoption of technology in this industry, how some firms are gaining a competitive advantage, improving productivity and client retention, and cutting costs.**



# Step-by-step protocol:

## 1. Recognize and acknowledge that you're stuck or procrastinating:

*Sarah realizes that she's been avoiding the research phase because she's overwhelmed by the amount of information she needs to gather and synthesize for her article.*

## 2. Ask yourself why:

*She identifies that the vastness of the topic and the need to find specific, credible sources are causing her to procrastinate.*

## 3. What would be a dream-come-true scenario for me right now?

*Sarah envisions having a well-organized collection of research that covers all aspects of technology adoption in US accounting firms, including adoption rates, competitive advantages, productivity improvements, client retention strategies, and cost-cutting measures.*



# Step-by-step protocol (cont.)

4. **What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:**

Sarah decides to have a conversation with herself to clarify the context and question. She takes that conversation to an AI tool, using the following prompt:

*"I need detailed research on how accounting firms in the US are deploying new technology. Specifically, I want to know about the adoption rates (whether slow or fast), how some firms are developing a competitive advantage, how they're improving productivity and client retention, and how they're cutting costs. Can you gather and summarize this information from reliable sources?"*



# Step-by-step protocol (cont.)

## 5. Look at the results. Then ask yourself one or more self-reflection questions:

Sarah reviews the AI-generated suggestions and corrections. Here's just some of what turns up. The AI tool provides citations for all its findings:

### **Adoption Rates:**

"Recent studies indicate that technology adoption in US accounting firms is accelerating, with a significant shift towards cloud-based solutions and AI tools."

### **Competitive Advantage:**

"Firms leveraging advanced analytics and automation are outperforming peers by offering more personalized services and faster turnaround times."

### **Productivity Improvements:**

"The integration of AI and machine learning is streamlining routine tasks, allowing accountants to focus on more strategic activities."

### **Client Retention:**

"Enhanced data security and improved client communication through technology are key factors in higher client retention rates."

### **Cost Cutting:**

"Automation of manual processes is leading to significant cost reductions, enabling firms to offer competitive pricing."

# Step-by-step protocol (cont.)

**What's good here?**

*The summaries provide a comprehensive overview of each aspect.*

**What's missing?**

*Specific examples or case studies from accounting firms.*

**What haven't I thought of?**

*Exploring the challenges faced by firms in adopting new technology.*

**What could be better?**

*Including statistics or data points to support the claims.*



# Step-by-step protocol (cont.)

**What ideas surfaced that I didn't expect?**

*The impact of enhanced data security on client retention.*

**How could I dive a little deeper?**

*Investigate case studies of firms that have successfully adopted new technology.*

**How can I build on this?**

*Add direct quotes from industry experts or leaders.*

**What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?**

*What are the specific technologies being adopted, and how do they differ between large and small firms?*

# Step-by-step protocol (cont.)

**6. Use those questions to create a new prompt to get you close to what you need:**

*Sarah inputs a new prompt:*

*"Can you provide specific examples or case studies of US accounting firms that have successfully adopted new technology? Include details on the challenges they faced, the specific technologies they implemented, and any statistics or data points that support their success."*



# Step-by-step protocol (cont.)

## 7. Repeat steps 5 and 6 as needed:

*Sarah reviews the new AI-generated case studies, finding detailed examples and supportive data, and continues refining the research by iterating on the prompts and AI feedback until she has a thorough and well-organized collection of information.*



# Use case example #6: **Synthesis**





# How AI can help:

AI can assist in the synthesis process by integrating diverse perspectives, performing thematic analysis, offering cross-disciplinary insights, developing new concepts, building arguments, creating comprehensive guides, and extracting and highlighting trends. It leverages natural language processing and machine learning algorithms to analyze and combine information from various sources, providing a cohesive and structured narrative tailored to specific needs.

# Some examples of AI's application here:

- **Integrating Diverse Perspectives:** Combining multiple viewpoints or findings from different sources into a coherent narrative for feature articles, discussion papers, or comprehensive reports.
- **Thematic Analysis:** Categorizing information by themes, identifying connections, and suggesting a logical flow for presenting sub-themes in content centered around a central topic.
- **Cross-Disciplinary Insights:** Bridging insights across various fields (e.g., technology and psychology) to create a unified analysis that enriches content and appeals to a broader audience.
- **Developing New Concepts:** Creating new concepts or models by combining elements from different theories or practices to address current challenges or gaps.
- **Argument Building:** Synthesizing supporting evidence from multiple sources to build a strong case, summarizing key points, and structuring them to support the main argument effectively.
- **Creating Comprehensive Guides or Resources:** Synthesizing instructions, best practices, FAQs, and tips into comprehensive, easy-to-understand educational content or in-depth guides.
- **Extracting and Highlighting Trends:** Identifying and synthesizing trends from large amounts of data or information to understand shifts or developments in a particular area, useful for market analysis, historical overviews, or technology evolution studies.



# Benefits of incorporating AI here:

- **Enhanced Understanding:** AI tools help combine diverse pieces of information into a cohesive whole, making complex topics easier to understand and communicate.
- **Efficiency:** Quickly synthesizes large volumes of information, saving significant time in the research and analysis phases.
- **Comprehensive Coverage:** Provides a well-rounded view by integrating insights from various sources and disciplines.
- **Clarity and Coherence:** Ensures that the final content is structured logically, with clear connections between different points and themes.
- **Innovative Thinking:** Aids in developing new concepts and frameworks by combining existing ideas creatively.
- **Strong Arguments:** Helps build compelling arguments by effectively summarizing and organizing supporting evidence.
- **Trend Identification:** Makes it easier to identify and highlight trends, providing valuable insights for strategic decisions and analyses.

# Scenario:

David is a freelance content writer working on an opinion piece for a business magazine about the benefits of adopting AI technology in small to medium-sized enterprises (SMEs). He has gathered various sources of supporting evidence but is struggling to synthesize this information into a strong, coherent argument.

# Step-by-step protocol:

## 1. Recognize and acknowledge that you're stuck or procrastinating:

*David acknowledges that he's feeling overwhelmed by the diverse pieces of evidence he has collected and is unsure how to synthesize them into a compelling argument.*

## 2. Ask yourself why:

*He identifies that the complexity of the topic and the need to present a persuasive argument are causing his procrastination.*

## 3. What would be a dream-come-true scenario for me right now?

*He imagines having a clear structure for his argument, with key points synthesized from various sources and presented in a logical, persuasive manner.*



# Step-by-step protocol (cont.)

4. **What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:**

David decides to have a conversation with himself to clarify the context and question. He takes that conversation to an AI tool, using the following prompt:

*“You’re a world-class technology consultant working for one of the top global consulting firms. I need your help building a strong argument for an opinion piece on the benefits of adopting AI technology in SMEs. Can you synthesize the supporting evidence from various sources into key points that build a compelling case?”*

# Step-by-step protocol (cont.)

## 5. Look at the results. Then ask yourself one or more self-reflection questions:

David reviews the AI-generated synthesis:

### **Point 1: Improved Efficiency and Productivity**

- Evidence: Studies show that AI can automate routine tasks, allowing employees to focus on more strategic activities.
- Example: A case study of a small accounting firm that increased productivity by 30% after implementing AI tools.

### **Point 2: Cost Savings**

- Evidence: AI can reduce operational costs by optimizing resource allocation and minimizing errors.
- Example: Research data indicating that SMEs using AI for supply chain management reported a 20% reduction in costs.

### **Point 3: Enhanced Decision-Making**

- Evidence: AI provides data-driven insights that help businesses make informed decisions.
- Example: An SME in the retail sector using AI analytics to improve inventory management and customer targeting.

### **Point 4: Competitive Advantage**

- Evidence: Early adopters of AI gain a competitive edge by offering innovative solutions and improving customer experiences.
- Example: A tech startup leveraging AI to deliver personalized services, leading to increased customer loyalty.

# Step-by-step protocol (cont.)

## What's good here?

*The key points are well-supported by evidence and examples. Also, the argument covers multiple benefits of AI adoption.*

## What's missing?

*Addressing potential counterarguments or concerns about AI adoption.*

## What haven't I thought of?

*Including testimonials or quotes from business leaders who have successfully adopted AI.*

## What could be better?

*Strengthening the connection between the key points and the overall argument.*



# Step-by-step protocol (cont.)

**What ideas surfaced that I didn't expect?**

*The idea to use real-world examples to illustrate the benefits.*

**How could I dive a little deeper?**

*Providing more detailed examples and statistics to back up each point.*

**How can I build on this?**

*Creating a narrative that links the benefits of AI adoption to the long-term success of SMEs.*

**What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?**

*What are the common challenges SMEs face when adopting AI, and how can they overcome these challenges?*

# Step-by-step protocol (cont.)

**6. Use those questions to create a new prompt to get you close to what you need:**

*David inputs a new prompt:*

*"Using the key points provided, can you include potential counterarguments or concerns about AI adoption in SMEs and suggest how these can be addressed? Additionally, incorporate testimonials or quotes from business leaders who have successfully adopted AI."*

# Step-by-step protocol (cont.)

## 7. Repeat steps 5 and 6 as needed:

*David reviews the refined AI-generated argument, which now includes counterarguments, solutions, and testimonials, and continues refining the argument by iterating on the prompts and AI feedback until he arrives at a compelling and well-supported opinion piece.*



**Use case example #7:**

# **Content Repurposing**





# How AI can help:

AI can assist in the content repurposing process by reworking pieces into different formats, breaking up longer pieces into smaller chunks, and combining multiple pieces into one longer work. It uses natural language processing and machine learning algorithms to understand the original content and generate new versions tailored to different channels, audiences, or applications.



# Some examples of AI's application here:

## **Reworking a Piece into a Different Format or for a Different Channel/Audience:**

- Transforming a blog post into a video script or a podcast episode.
- Adapting a white paper into an infographic for social media.
- Tailoring an article for different audiences by changing examples and adjusting the tone.

## **Breaking Up a Longer Piece into Smaller Chunks:**

- Dividing an ebook into a series of blog posts.
- Creating social media snippets from a comprehensive report.
- Extracting key points from a webinar to create a series of short articles.

## **Combining Multiple Pieces into One Longer Piece:**

- Merging several related blog posts into an ebook.
- Combining different case studies into a comprehensive industry report.
- Integrating various tutorials into a single, detailed guide.

# Benefits of incorporating AI here:

- **Extended Reach:** AI tools help adapt content to different formats and channels, allowing you to reach a broader audience.
- **Efficiency:** Quickly repurposes existing content, saving time and effort compared to creating new content from scratch.
- **Consistency:** Ensures a consistent message and tone across different formats and channels.
- **Enhanced Value:** By breaking down and combining content, AI can help extract more value from existing materials.
- **Increased Engagement:** Tailors content to specific audiences and formats, making it more engaging and relevant.

# Scenario:

Emily is a freelance content writer who has written a detailed blog post about sustainable living practices. She now needs to transform this blog post into a video script for her client's YouTube channel.

# Step-by-step protocol:

## 1. Recognize and acknowledge that you're stuck or procrastinating:

*Emily acknowledges that she's feeling stuck because she's unsure how to effectively transform the blog post into an engaging video script.*

## 2. Ask yourself why:

*Emily realizes that the challenge lies in adapting the written content for a visual and auditory format, ensuring it remains engaging and informative.*

## 3. What would be a dream-come-true scenario for me right now?

*She wishes she had a well-structured video script that captures the essence of the blog post while being tailored for a YouTube audience.*



# Step-by-step protocol (cont.)

## 4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:

Emily decides to have a conversation with herself to clarify the context and question. She takes that conversation to an AI tool, using the following prompt:

*“You’re a world-class expert on creating engaging and viral video content. I need your help transforming a blog post on sustainable living practices into a video script for YouTube. The script should be engaging, concise, and include visual and auditory elements. Can you help outline and draft this script? Below is the blog post draft. Let’s start with the outline for the video script.” [Insert blog post draft here]*

# Step-by-step protocol (cont.)

## 5. Look at the results. Then ask yourself one or more self-reflection questions:

Emily reviews the AI-generated outline:

### **Introduction:**

Hook: "Imagine saving the planet while saving money. Today, we'll show you how with sustainable living practices!"

Brief overview of what will be covered in the video.

### **Section 1: Reducing Waste:**

"First, let's talk about reducing waste. Simple changes like using reusable bags and containers can make a big difference."

Suggest visuals: Showing reusable items.

### **Section 2: Energy Efficiency:**

"Next, improving energy efficiency at home. Switch to LED bulbs and consider smart thermostats."

Suggest visuals: Energy-efficient products in use.

### **Section 3: Sustainable Food Choices:**

"Finally, let's discuss sustainable food choices. Eating locally and seasonally reduces your carbon footprint."

Suggest visuals: Farmers' markets and seasonal produce.

### **Conclusion:**

Recap main points.

Call to action: "Start making these changes today and see the difference they can make. Don't forget to like, share, and subscribe for more tips!"

# Step-by-step protocol (cont.)

## What's good here?

*The script is engaging and covers the main points of the blog post. Visual and auditory elements are suggested.*

## What's missing?

*Specific examples or statistics to back up the points.*

## What haven't I thought of?

*Including a personal anecdote or story to make it more relatable.*

## What could be better?

*Adding more interactive elements, such as questions to the audience.*

# Step-by-step protocol (cont.)

**What ideas surfaced that I didn't expect?**

*The idea to use specific visuals to enhance the message.*

**How could I dive a little deeper?**

*Elaborating on each section with more detailed information.*

**How can I build on this?**

*Including a brief segment for viewer questions or comments.*

**What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?**

*How can I make the script more interactive and engaging for the audience?*



# Step-by-step protocol (cont.)

**6. Use those questions to create a new prompt to get you close to what you need:**

*Emily inputs a new prompt:*

*"Using the provided video script outline, can you add specific examples, statistics, and a personal anecdote for each section? Also, suggest ways to make the script more interactive and engaging for the audience."*

# Step-by-step protocol (cont.)

## 7. Repeat steps 5 and 6 as needed:

*Emily reviews the refined AI-generated script, which now includes detailed examples, statistics, and interactive elements. She continues refining the script by iterating on the prompts and AI feedback, and by editing until the script is very conversational. She eventually arrives at a comprehensive and engaging video script for the YouTube channel.*



# Use case example #8: Analyzing Data & Trends





# How AI can help:

AI can assist in analyzing data and identifying trends by processing large volumes of raw data and extracting meaningful patterns and insights. It leverages machine learning algorithms and natural language processing to analyze various types of data, such as social media performance metrics, website analytics, and customer survey responses, to aid in strategic decision-making.



# Some examples of AI's application here:

**Identifying Patterns and Insights from Data:** AI tools can analyze large datasets to identify trends and patterns that might not be immediately obvious, aiding in strategic decisions.

**Social Media Post Performance:** AI can analyze engagement metrics from social media profiles, such as likes, shares, comments, and views, to determine which types of content perform best.

**YouTube Video Performance:** AI can evaluate video performance data, such as watch time, audience retention, and subscriber growth, to provide insights for content strategy adjustments.

**Website Analytics:** AI can analyze website traffic, user behavior, and conversion rates to inform content strategy and improve user experience.

**Customer Survey Responses:** AI can process and analyze customer feedback from surveys to identify common themes, satisfaction levels, and areas for improvement.

# Benefits of incorporating AI here:

- **Enhanced Decision-Making:** AI tools provide data-driven insights that help inform strategic decisions, making them more accurate and effective.
- **Efficiency:** Quickly processes large datasets, saving time and effort compared to manual analysis.
- **Trend Identification:** Identifies trends and patterns that might be missed through manual analysis, providing a deeper understanding of the data.
- **Actionable Insights:** Transforms raw data into actionable insights that can be used to improve content strategy, user engagement, and overall performance.
- **Comprehensive Analysis:** Provides a holistic view of data from various sources, ensuring a well-rounded analysis.

# Scenario:

**Maria is a freelance content writer managing the social media accounts for a tech startup. She wants to analyze the performance of the company's social media posts to inform and adjust the content strategy for better engagement and reach.**

# Step-by-step protocol:

## 1. Recognize and acknowledge that you're stuck or procrastinating:

*Maria acknowledges that she's been avoiding the task of analyzing social media performance.*

## 2. Ask yourself why:

*She admits to herself that the data is overwhelming and she's unsure how to make sense of it and draw meaningful insights.*

## 3. What would be a dream-come-true scenario for me right now?

*She wishes she could wave a magic wand and get a clear, data-driven report that highlights the key performance metrics, identifies patterns, and provides actionable recommendations for improving social media engagement.*



# Step-by-step protocol (cont.)

- 4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:**

Maria decides to have a conversation with herself to clarify the context and question. She takes that conversation to an AI tool, using the following prompt:

*"You're a data analyst with a gift for identifying important data patterns. I need your help analyzing the performance of our social media posts. Can you provide a detailed analysis of the engagement metrics below (likes, shares, comments, and views) and suggest actionable insights to improve our content strategy?" [Insert metrics file or data here]*

# Step-by-step protocol (cont.)

## 5. Look at the results. Then ask yourself one or more self-reflection questions:

Maria reviews the AI-generated analysis:

### **Top Performing Posts:**

Posts featuring user-generated content had 40% more engagement.

Infographic posts received the highest shares and comments.

### **Engagement Metrics:**

Average likes per post: 120

Average shares per post: 45

Average comments per post: 30

### **Patterns Identified:**

Posts published on weekdays between 10 AM and 2 PM performed better.

Posts with questions or calls-to-action had higher comment rates.

### **Recommendations:**

Increase the use of user-generated content and infographics.

Post consistently during peak engagement times.

Include more questions and calls-to-action in posts.

# Step-by-step protocol (cont.)

## What's good here?

*The analysis highlights top-performing posts and key engagement metrics. Also, clear patterns and actionable recommendations are provided.*

## What's missing?

*Insights into why certain posts performed better.*

## What haven't I thought of?

*Comparing engagement across different social media platforms.*

## What could be better?

*More detailed breakdown of engagement by content type (e.g., video, image, text).*

# Step-by-step protocol (cont.)

**What ideas surfaced that I didn't expect?**

*The suggestion to increase the use of user-generated content.*

**How could I dive a little deeper?**

*Analyzing the engagement metrics of individual posts to identify specific elements that contributed to their success. (i.e., What were the qualitative elements that made them great?)*

**How can I build on this?**

*Creating a content calendar based on the findings and recommendations.*

**What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?**

*How do engagement metrics differ across different types of posts (e.g., promotional vs. informational)?*



# Step-by-step protocol (cont.)

**6. Use those questions to create a new prompt to get you close to what you need:**

*Maria inputs a new prompt:*

*"Can you provide a detailed breakdown of engagement metrics by content type (video, image, text) and explain why certain posts performed better? Also, compare the engagement across different social media platforms."*

# Step-by-step protocol (cont.)

## 7. Repeat steps 5 and 6 as needed:

*Maria reviews the refined AI-generated analysis, which now includes a detailed breakdown of engagement metrics by content type and platform comparisons. She continues refining the analysis by iterating on the prompts and AI feedback until she arrives at a comprehensive and actionable report and action plan for her client.*



# Use case example #9: Project Planning & Mapping





# How AI can help:

AI can assist in project planning and mapping by organizing complex projects into manageable plans that account for all people, resources, milestones, and constraints. It leverages machine learning algorithms to analyze project requirements, suggest optimal timelines, allocate resources efficiently, and identify potential risks.



# Some examples of AI's application here:

**Organizing Client Projects:** Creating detailed project plans for client projects, including timelines, milestones, and resource allocation. Managing multiple stakeholders and ensuring clear communication of roles and responsibilities. And implementing a "ball in court" element to the plan to clearly assign tasks and responsibilities, ensuring accountability and transparency.

**Internal Project Management:** Structuring internal initiatives, such as developing a new service offering or revamping a website, into actionable steps with clear deadlines.

**Resource Allocation:** Optimizing the use of resources, including team members, budget, and tools, to ensure projects are completed efficiently and within constraints.

**Risk Management:** Identifying potential risks and developing mitigation strategies to keep projects on track.

**Progress Tracking:** Monitoring project progress in real-time and adjusting plans as needed to address any deviations or obstacles. And using "ball in court" tracking to identify bottlenecks and ensure timely task completion.

# Benefits of incorporating AI here:

- **Improved Organization:** AI tools help break down complex projects into manageable tasks, making it easier to oversee and execute them.
- **Efficiency:** Streamlines the planning process, saving time and effort in creating detailed project plans manually.
- **Resource Optimization:** Ensures that resources are allocated efficiently, minimizing waste and maximizing productivity.
- **Risk Mitigation:** Identifies potential risks early and suggests mitigation strategies to avoid project delays or failures.
- **Enhanced Communication:** Facilitates clear communication among team members and stakeholders, ensuring everyone is aligned with the project goals and timelines.
- **Real-Time Adjustments:** Provides the ability to track progress and make real-time adjustments, keeping projects on track and within scope.
- **Accountability:** "Ball in court" tracking ensures that task ownership is clear, and responsibilities are managed effectively, reducing confusion and enhancing accountability.

# Scenario:

John is a freelance content writer tasked with managing a large client project for a midsize clothing company. The project involves creating a comprehensive corporate responsibility report, including sections on sustainability practices, ethical sourcing, community engagement, and environmental impact. John needs to create a detailed project plan that accounts for all tasks, resources, deadlines, and team members involved.

# Step-by-step protocol:

## 1. Recognize and acknowledge that you're stuck or procrastinating:

*John acknowledges that he's feeling overwhelmed by the complexity of the project and has been putting off creating the project plan.*

## 2. Ask yourself why:

*He realizes that the challenge lies in organizing the many moving parts of the project and ensuring that all tasks are clearly defined and assigned to the right people. This is NOT one of his strengths.*

## 3. What would be a dream-come-true scenario for me right now?

*He wishes he could somehow create a clear, detailed project plan that outlines all tasks, deadlines, resources, and responsibilities, making it easy for him to track progress and ensure timely completion.*



# Step-by-step protocol (cont.)

## 4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:

John decides to have a conversation with himself to clarify the context and question. He takes that conversation to an AI tool, using the following prompt:

*“You’re an operation genius and expert project manager. I need your help creating a detailed project plan for a corporate responsibility report for a midsize clothing company. The project involves sections on sustainability practices, ethical sourcing, community engagement, and environmental impact. Can you help outline the tasks, assign responsibilities, set deadlines, and identify potential risks? I’ve pasted the relevant details you’ll need below” [Insert all the logistical project details here]*

Task Breakdown Table

Section	Task	Responsible	Deadline
Sustainability Practices	Research and gather data	John	Month 1
	Write draft	John	Month 2
	Edit and approve	John	Month 3
Ethical Sourcing	Research and compile information	Research Assistant	Month 1
	Write draft	John	Month 2
	Edit and approve	John	Month 3
Community Engagement	Gather information on programs	Community Manager	Month 1
	Write draft	John	Month 2
	Edit and approve	John	Month 3
Environmental Impact	Collect data on initiatives	Environmental Specialist	Month 1
	Write draft	John	Month 2
	Edit and approve	John	Month 3
Final Compilation and Review	Compile all sections into a single document	John	Month 3
	Review and finalize report	John and Client	Month 4

# Step-by-step protocol (cont.)

**5. Look at the results. Then ask yourself one or more self-reflection questions:**

## **Resource Allocation:**

- Research Assistant
- Community Manager
- Environmental Specialist
- Graphic Designer (for final report layout)

## **Risk Management:**

- Potential delay in data collection: Mitigation strategy – Assign backup researchers.
- Approval bottlenecks: Mitigation strategy – Set clear review deadlines and follow up regularly.

## **Progress Tracking:**

- Weekly check-ins with the team.
- Use of project management tools like Trello or Asana.

## **"Ball in Court" Tracking:**

- Each task clearly assigned with responsible person and deadlines.
- Use of project management tools to track who has the current responsibility.

# Step-by-step protocol (cont.)

## What's good here?

*The plan is comprehensive and outlines all tasks and responsibilities clearly. The inclusion of risk management and progress tracking is helpful.*

## What's missing?

*Specific dates for each deadline to ensure clarity.*

## What haven't I thought of?

*Adding buffer times to account for unexpected delays.*

## What could be better?

*More detailed steps for content approval processes.*



# Step-by-step protocol (cont.)

**What ideas surfaced that I didn't expect?**

*The suggestion to use "ball in court" tracking for task ownership.*

**How could I dive a little deeper?**

*Breaking down tasks into more granular steps if necessary.*

**How can I build on this?**

*Creating a communication plan for regular updates and feedback.*

**What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?**

*How can I ensure that all team members are aligned and aware of their responsibilities?*

# Step-by-step protocol (cont.)

**6. Use those questions to create a new prompt to get you close to what you need:**

*John inputs a new prompt:*

*"Using the detailed project plan provided, can you add specific dates for each deadline, buffer times to account for delays, and more detailed steps for the content approval process? Also, suggest a communication plan for regular updates and feedback."*

# Step-by-step protocol (cont.)

## 7. Repeat steps 5 and 6 as needed:

*John reviews the refined AI-generated project plan, which now includes specific dates, buffer times, detailed approval steps, and a communication plan. He continues refining the plan by iterating on the prompts and AI feedback until he arrives at a comprehensive and practical project plan.*



Use case example #10:

# **Problem-Solving & Stress-testing Potential Ideas**





# How AI can help:

AI can assist in problem-solving and stress-testing potential ideas by providing solutions to complex problems, identifying flaws and merits in ideas, and offering alternative options. It uses natural language processing and machine learning algorithms to analyze arguments, identify risks, and suggest improvements or alternative strategies.

# Some examples of AI's application here:

**Playing Devil's Advocate:** AI can help refine arguments by identifying weaknesses and strengths, ensuring a solid case for an idea or product. Example: Using AI to play devil's advocate and refine arguments in an opinion piece you're writing for a client.

**Identifying Risks in Marketing Strategies:** AI can help identify potential holes and risks in a marketing strategy, providing a clearer view of potential pitfalls and areas for improvement. Example: Using AI to analyze and stress-test a marketing strategy for generating new leads, ensuring it is robust and effective.

**Testing Product Launch Ideas:** AI can simulate different product launch scenarios, identifying potential risks and predicting outcomes based on user-provided market data. Example: Using AI to stress-test a product launch plan, identifying the best marketing channels, pricing strategies, and target audience segments.

**Improving Your Proposals:** AI can review proposals you draft for clients and prospects, identify potential weaknesses, and suggest enhancements to make the proposals more compelling and persuasive.

**Refining Brand Messaging:** AI can evaluate brand messaging, identify inconsistencies or weaknesses, and suggest alternative messaging that better aligns with the brand's values and target audience.

**Enhancing Customer Experience:** AI can analyze customer feedback and behavior, identifying pain points and suggesting improvements to enhance the overall customer experience.

# Benefits of incorporating AI here:

- Enhanced Problem-Solving
- Improved Arguments
- Risk Mitigation
- Alternative Solutions
- Efficiency
- Diverse Perspectives

# Scenario:

**Brian is a freelance content writer tasked with writing a content marketing piece for a client who develops advanced medical devices. He needs to make a solid case for why healthcare providers should adopt a new wearable health monitoring device, but he's struggling to refine his arguments and ensure they are compelling and robust.**



# Step-by-step protocol:

## 1. Recognize and acknowledge that you're stuck or procrastinating:

*Brian acknowledges that he's feeling stuck in this project. He's procrastinating like crazy, and the deadline is rapidly approaching!*

## 2. Ask yourself why:

*He's unsure if his arguments are strong enough to persuade his client's target audience. He thinks there are a number of potential weaknesses in his arguments and he's not sure how to find ways to strengthen them. So he keeps putting this off.*

## 3. What would be a dream-come-true scenario for me right now?

*He wishes he could magically have a refined set of arguments that clearly highlight the benefits of the wearable health monitoring device and address potential counterarguments effectively.*

# Step-by-step protocol (cont.)

## 4. What prompt could I give AI (a combo of background info/context AND a question) so it's more likely to generate that dream-come-true scenario:

Brian decides to have a conversation with himself to clarify the context and question. He takes that conversation to an AI tool, using the following prompt:

*“You’re an expert content marketer with a high degree of empathy and a gift for understanding buyer objections before they even mention them. I need your help refining my arguments for a content marketing piece on why healthcare providers should adopt a new wearable health monitoring device. Can you play devil’s advocate and identify weaknesses in my arguments, as well as suggest ways to strengthen them? I’ve pasted by outline draft below for your review.” [Insert current outline here]*

# Step-by-step protocol (cont.)

## 5. Look at the results.

**Initial Argument:** Wearable health monitoring devices improve patient outcomes.

- **AI Devil's Advocate:** Some healthcare providers may argue that wearable devices are not always reliable or accurate.
- **Strengthening Suggestion:** Highlight advancements in technology that have improved accuracy and reliability, and include case studies demonstrating positive patient outcomes.

# Step-by-step protocol (cont.)

## 5. Look at the results.

**Initial Argument:** Wearable devices reduce the workload for healthcare providers by providing continuous monitoring.

- **AI Devil's Advocate:** Some may argue that integrating wearable device data into existing systems can be complex and time-consuming.
- **Strengthening Suggestion:** Provide examples of seamless integration with existing healthcare systems and highlight the time-saving benefits in the long run.



# Step-by-step protocol (cont.)

## 5. Look at the results.

**Initial Argument:** Patients prefer wearable devices for their convenience and non-invasiveness.

- **AI Devil's Advocate:** Some patients may be concerned about privacy and data security.
- **Strengthening Suggestion:** Emphasize the robust security measures in place to protect patient data and share testimonials from patients who have had positive experiences.

# Step-by-step protocol (cont.)

## What's good here?

*The AI provided counterarguments that potential clients might have, helping to see the other side. Strengthening suggestions are practical and actionable.*

## What's missing?

*Specific statistics or data to back up the claims.*

## What haven't I thought of?

*Addressing potential cost concerns for healthcare providers.*

## What could be better?

*Including more emotional appeals to connect with the audience on a personal level.*

# Step-by-step protocol (cont.)

**What ideas surfaced that I didn't expect?**

*The importance of highlighting advancements in technology and robust security measures.*

**How could I dive a little deeper?**

*Researching and including specific examples and case studies to strengthen the arguments.*

**How can I build on this?**

*Adding a section that directly addresses and debunks common myths about wearable health monitoring devices.*

**What follow-up, probing, or clarifying questions could I ask to get even richer insights or ideas?**

*What are the specific benefits and challenges healthcare providers have faced when adopting wearable health monitoring devices?*

# Step-by-step protocol (cont.)

**6. Use those questions to create a new prompt to get you close to what you need:**

*Brian inputs a new prompt:*

*"Using the initial arguments and suggestions, can you provide specific statistics, examples, and case studies to support the claims? Additionally, include a section that addresses common myths and potential cost concerns for healthcare providers. Don't draft the content for that section yet. Let's just start with an outline for now and I'll direct you further from there."*



# Step-by-step protocol (cont.)

## 7. Repeat steps 5 and 6 as needed:

*Brian reviews the refined AI-generated content, which now includes detailed statistics, examples, and a detailed outline for a new section addressing common myths. He continues refining the content by iterating on the prompts and AI feedback until he arrives at a compelling and well-supported “Frankendraft.” He then moves into the editing phase with great momentum on his side.*

**There are DOZENS  
of other use cases!**

**The AI false choice**

**AI can help you become a better  
thinker and communicator**





# HIGH-INCOME BUSINESS WRITING