Smart Planning with AI

Participant Workbook

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Project Managers & Business Analysts

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Welcome

Welcome to Smart Planning with AI. This workbook is your personal reference guide and hands-on workspace. Use it to capture prompts that work, record your own discoveries, and build a toolkit you can use long after today's session.

This workshop is tool-agnostic. Whether your organization has you on Copilot, ChatGPT, Claude, Gemini, or something else entirely, the prompts and patterns in this workbook transfer. Where a prompt appears, enter it into whichever tool you are approved to use at work.

How to Use This Workbook

- **Try the prompts live** — Each module contains example prompts in highlighted boxes. Enter them directly into your AI tool during the session.
- **Capture your thinking** — Lined writing areas are provided throughout. Record your own prompts, observations, and ideas as you go.
- **Complete the activities** — Activity sections include step-by-step instructions for hands-on exercises using your own work.
- **Build your toolkit** — Add your favorite prompts from each module. What you write down is what you will still be using in ninety days.

How to Approach the Exercises

This workshop is designed for people with very different levels of AI experience. Some participants may be opening an AI tool for the first time. Others already use one daily. For each activity, choose the approach that fits your current comfort level.

Starter

Use the sample prompt almost exactly as written. Focus on seeing what AI can do and how the output changes based on the information you provide.

Builder

Add more context to the prompt. Ask for a specific format, include more detail about your audience or situation, and refine the output with follow-up instructions.

Power User

Push the tool further. Ask for alternatives, risks, assumptions, missing information, source checks, or a verification checklist. Use AI as a thinking partner, not just a writing tool.

The goal is not to write the most complicated prompt. The goal is to find practical ways AI can save time, reduce rework, improve communication, and support better decisions in your project work.

Where the Room Stands

It is easy to assume everyone else is further along than you are. The data says otherwise.

- 27% of white-collar employees report using AI frequently at work — up 12 points in two years (Gallup, 2026).
- 41% of U.S. workers use AI for work purposes; 34% do not use AI tools at all (SHRM, 2026).
- The largest skill segment — roughly 41% — has little real AI usage to show for it. True power users are closer to 10–15% of the workforce.

Translation: if you feel behind, you are in the majority. If you are already fluent, this workshop is about depth, not basics.

My Tool for Today

Before we start, note what you are approved to use at work and which tool you will use in this session:

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MODULE 1

Setting Up Your AI for PM/BA Work

Module Objective

Give your AI tool the context it needs to be useful on project work — your role, your stakeholders, your output rules — and know the edges of the tool you are using.

Key Ideas

If AI is going to help you with project work, it needs more than a login. It needs context. When you tell it who you are, what you do, how you think, and what your stakeholders care about, the output becomes a lot more usable and a lot less "intern wrote this at 4:55 p.m."

There are four setup moves: tell the model your role, tell it how you communicate, tell it who you work with, and tell it what kind of output you want. In other words: role, expectations, audience, deliverable.

The point is not to create the perfect prompt once and frame it on the wall. The point is to give the model enough guidance that your first draft is closer to useful, your summaries are shaped the way you need them, and the model asks instead of guessing when key context is missing.

Most tools now let you save this permanently — look for custom instructions, personalization, profile, or memory settings. Write it once, benefit every session.

Sample Setup Language

Role

I'm a Project Manager in [industry]. I manage cross-functional teams, communicate with executives, and focus on delivering projects on time and on budget.

OR

I'm a Business Analyst in [industry]. I gather requirements, document processes, bridge technical and business teams, and ensure stakeholder alignment.

How I think / communicate

My communication style is [direct / warm / formal / casual]. I prefer [bullet points / short paragraphs / executive summaries]. Do not use phrases like "leverage synergies," "circle back," "deep dive," "delve," or "move the needle." Do not make assumptions about deadlines, budgets, or stakeholder approval. Do not add exclamation points to professional emails unless I ask. Remove em dashes.

Audience

My primary stakeholders are [titles or groups]. What matters to them most is [their key concern].

Deliverable rules

When I ask for a summary, give me 3–5 bullet points. Emails: under 150 words. Risks: prioritize by impact, not alphabetically. If context is missing, ask me rather than guessing.

Know the Edges of Your Tool

Prompting works roughly the same everywhere. What differs is what the tool can reach and what it remembers. Before you rely on it, find out:

Capability	Can my tool do this?	Notes / limits
Read files I upload		
Remember me between chats		
Search the live web		
See my company email / calendar / files		
Handle confidential or client data		
Take multi-step action on my behalf		

Also worth knowing: AI meeting notetakers (built into most conferencing platforms, plus standalone tools) will transcribe, summarize, and pull action items automatically. Useful, but check your organization's recording and consent policy before turning one loose in a stakeholder meeting.

✎ Activity: Build Your Setup

Write your own setup language, then save it into your tool's custom instructions or memory so you never have to type it again.

1. Draft your four setup blocks using the space below: role, communication style, audience, deliverable rules.
2. Enter them into your tool's custom instructions / personalization / memory setting.

3. Test it: ask for a short project status update on any topic and see whether the output already sounds more like you.
4. Adjust one rule based on what came back. This is normal — setup is iterative.

Sample Prompt:

> *"Here is how I want you to work with me going forward. [Paste your four blocks.] Confirm you understand, then ask me one question at a time until you have enough information to help me with a project status update."*

My role

My communication style

What my stakeholders care about most

My output rules for AI

Key Takeaways — what will you apply first?

MODULE 2

Tips & Tricks

Module Objective

Build your personal prompting toolkit — techniques, patterns, and habits that work in any AI tool and raise the quality of everything else you do today.

Prompt Engineering Essentials: The RTF Framework

Letter	Element	Description	Example
R	Role	Tell the AI who to be	"Act as a senior project manager…"
T	Task	Specify what to do	"Summarize, compare, draft, analyze…"
F	Format	Define the output shape	"As a table with columns for X, Y, Z…"

You can add other items as appropriate — concise, explain it like I'm a high school sophomore, write it in my voice (give it examples), keep it under 150 words, and so on.

Add This at the End

"Ask me one question at a time until you have enough information to complete the task."

This one line does more work than any other trick in this workbook. It stops the model from guessing at your context and forces it to gather what it actually needs.

Power User Tips

- **Be specific about format** — "Create a table with columns for X, Y, Z" beats "Organize this information."
- **Use iterative refinement** — Start broad, then narrow. "Now make it more concise" or "Add more detail on the dependency risk."
- **Set constraints** — "In 200 words or less" or "Using only the information in the issue log I pasted."

- **Chain prompts** — Use the output of one prompt as the input for the next to build complex deliverables.
- **Ask for alternatives** — "Give me three different approaches to…" expands your options and reveals trade-offs.
- **Ask what it needs** — "What information would make this answer better?" turns a weak first draft into a good second one.

Your Prompt Ideas — capture the patterns you want to keep

MODULE 3

Risk Register Enhancement

Module Objective

Use AI to turn a messy, inconsistent risk list into a structured register — categorized, assessed, and paired with mitigations and early warning indicators you would actually use.

Key Ideas

This is where AI starts to earn its keep for PMs and BAs. It is very good at turning messy lists into structured categories, surfacing patterns, summarizing what matters, and offering a first pass at logic you can then improve.

The danger is not that AI gives you structure. The danger is that it gives you structure with confidence. That is why we lean on a simple principle: let AI draft, sort, and suggest; let humans evaluate, refine, and decide.

A good prompt in this space does three things: it gives the model a role, it gives it a specific scenario and raw inputs, and it tells it exactly what steps and format you want.

When the answer comes back, do not ask “Is this smart?” Ask what it got right, what it over-assumed, what you would change based on real context, and what follow-up prompt would improve the result.

Scenario

You are the PM for the Aquila Mobile App Launch. The team has identified several risks, but they are scattered and inconsistent. Your job is to use AI to help clean up the list, categorize the risks, assess probability and impact, and suggest mitigation strategies and early warning indicators.

Raw risk list

- Key developer may leave during critical phase.
- Third-party API integration timeline uncertain.
- Budget approval may be delayed by finance review.
- Requirements may change after stakeholder demo.

Objective

By the end of this exercise, you should have a categorized risk list, probability and impact thinking for each risk, a few mitigation ideas worth keeping, and early warning indicators that would help you see trouble sooner.

✎ Activity: Risk Register Enhancement

1. Paste the prompt below along with the raw risk list and run it.
2. Read the response all the way through before judging it.
3. Look for categories that make sense and any that feel forced.
4. Review the probability and impact scores. Ask yourself whether the logic holds up.
5. Circle the mitigation ideas you would actually use.
6. Highlight any early warning indicators that would be genuinely helpful in a real project.
7. Ask a follow-up: "Now tighten this into a risk register format with one row per risk, and keep the reasoning short."
8. Be ready to discuss what AI did well, what it missed, and what you would change as the PM or BA.

Sample Prompt:

> *"You are assisting me as a project manager for the Aquila Mobile App Launch. Here are the risks: [paste list]. Categorize each risk, assess probability and impact with brief reasoning, suggest a mitigation strategy, and give me one early warning indicator per risk. Format as a table. Flag anything you had to assume."*

Capture Your Output

1. AI's categories

Risk	Category	Do I agree?	Notes
Key developer may leave during critical phase			
Third-party API integration timeline uncertain			
Budget approval delayed by finance review			
Requirements may change after stakeholder demo			

2. Probability and impact review

Risk	Probability	Impact	What I would adjust
Risk 1			
Risk 2			
Risk 3			
Risk 4			

3. Best mitigation ideas to keep

4. Early warning indicators worth watching

5. What AI missed, overstated, or guessed

MODULE 4

Issue Pattern Recognition

Module Objective

Use AI to find the pattern underneath a cluttered issue log — grouping related problems, separating systemic from isolated, and identifying the one issue worth resolving first.

Key Ideas

An issue log tells you what happened. It rarely tells you what is going on. AI is genuinely good at the grouping-and-theming work that most of us do badly under time pressure, because it does not get anchored on the loudest ticket.

What it is not good at is knowing which department has been quietly understaffed since January. That context is yours. The exercise below is about letting the model do the sorting so you can spend your judgment on the part that needs it.

Scenario

You are the PM for the Vega Data Warehouse Upgrade. The issue log is cluttered with individual problems, but you suspect there are underlying patterns. You want AI to group related issues, identify root causes, recommend actions and owners, and point to the single highest-impact issue to resolve first.

Raw issue list

- ETL jobs failing intermittently.
- Multiple teams reporting slow query performance.
- Vendor patch delayed two weeks.
- Confusion over data ownership between departments.
- Duplicate tickets for the same bug.

Objective

By the end of this exercise, you should have groups of related issues by theme or root cause, a better sense of what is systemic versus isolated, a prioritized action list with suggested owners, and one issue that stands out as the best candidate to resolve first.

✎ Activity: Issue Pattern Recognition

1. Paste the prompt below with the raw issue list and run it.
2. Review the issue groupings. Do they feel meaningful, or did the model just sort by surface similarity?
3. Look at the systemic problems section. Does it identify broader causes, or just repeat the symptoms?
4. Check the proposed actions and owners. Are they realistic? Are they at the right level?
5. Review the highest-impact issue choice and ask whether you agree.
6. If the answer is vague, follow up: "Make this more concrete. Put the actions in priority order and explain why the top issue matters most."
7. Be ready to discuss where AI helped you think more clearly and where it needed human correction.

Sample Prompt:

> *"You are assisting me as a project manager for the Vega Data Warehouse Upgrade. Here are the issues: [paste list]. Group related issues by theme or root cause, tell me which problems look systemic versus isolated, recommend prioritized actions with suggested owners, and identify the single highest-impact issue to resolve first. Explain your reasoning briefly."*

Capture Your Output

1. Issue themes / root causes

Issue	Theme or root cause	Do I agree?	Notes
ETL jobs failing intermittently			
Slow query performance			
Vendor patch delayed two weeks			
Confusion over data ownership			
Duplicate tickets for same bug			

2. Systemic problems AI identified

3. Prioritized actions and owners

Priority	Action	Suggested owner	Keep / revise
1			
2			
3			
4			

4. Single highest-impact issue — and why it matters most

5. What I would change before using this in real life

MODULE 5

Agentic AI for PMs and BAs

Module Objective

Understand the shift from AI that drafts to AI that does — where multi-step delegation is genuinely useful today, where it is still oversold, and what has to be true before you let it run.

Key Ideas

For the last few years, using AI meant one turn at a time: you asked, it answered, you reviewed. Agentic AI changes the shape of that. You give it a goal, it plans the steps, uses tools along the way, and comes back with a result rather than a draft.

For project work, that is a meaningful difference. The chat model can write you a status update. An agent can read the issue log, categorize it, draft the update, and put it in front of you — in one pass.

It also changes the stakes. When AI only writes text, a bad output costs you a rewrite. When AI takes action, a bad output costs you a mis-assigned ticket, a wrong email to a sponsor, or a schedule change nobody approved. Delegation and verification have to move together.

Three Levels of Delegation

Level	What it looks like	Good fit for
Assistant	One prompt, one answer. You review everything before it goes anywhere.	Drafting, summarizing, reframing, analysis
Chained	You run a sequence of prompts, feeding each output into the next.	Multi-part deliverables where you want a checkpoint at each step
Agentic	You give a goal and constraints. It plans, executes multiple steps, and reports back.	Research, first-pass synthesis across sources, repetitive structured work

Where Agents Are Genuinely Useful Today

- Deep research — pulling together a landscape across many sources, with citations you can check.
- First-pass synthesis — reading a long document set and producing a structured summary or comparison.

- Repetitive structured work — the same transformation applied across many items, like normalizing a backlog.
- Drafting into a shape — taking raw inputs and producing a full deliverable rather than a paragraph.

Where They Are Still Oversold

- Long unattended runs. The further it goes without you, the more likely it has drifted.
- Judgment calls that depend on organizational context it cannot see.
- Anything with real consequences on the other end — sending, committing, approving, assigning.
- Work where being 85% right is worse than not doing it at all.

Before You Delegate: The Guardrail Check

The more autonomy you hand over, the more these matter. Run this check before you let an agent touch real project work.

- **Is this tool approved?** Agentic tools often connect to email, files, and calendars. That is a bigger ask than a chat window. Confirm before connecting anything.
- **What data am I exposing?** Client names, personnel matters, contract terms, unreleased financials, anything under NDA — know your organization's line before you paste, not after.
- **What can it actually change?** Read-only is a very different risk profile from write access. Prefer read-only until you have reason to trust the workflow.
- **Where is my checkpoint?** Decide in advance where you review. “Draft it but do not send” is a legitimate and underused instruction.
- **Would I stake my name on this?** If it goes out under your name, it is your work regardless of what produced it.

✎ Activity: Delegate vs. Step-by-Step

You will run the same multi-step project task two ways and compare what you get.

1. Take the Vega issue list from Module 4 (or a real one of your own, with sensitive details removed).
2. Run it as three separate prompts: group the issues, then assign owners, then draft a stakeholder update. Review between each step.
3. Start a fresh chat. Run the whole thing as one delegated instruction using the sample prompt below.
4. Compare the two outputs. Which was more accurate? Which was more useful? Where did the single-pass version quietly guess at something?
5. Note where you would want a checkpoint if this were a real project.

Sample Prompt:

> *"You are assisting me as a project manager on the Vega Data Warehouse Upgrade. Goal: produce a stakeholder update I can review. Work through it in steps: group the issues by root cause, assign a suggested owner to each group, identify the highest-impact item, then draft a status update under 200 words for an executive sponsor. Show your work at each step. Flag every assumption you made. Do not invent names, dates, or numbers I did not give you."*

What the step-by-step version got right

What the single delegated version got right

Where it guessed, drifted, or over-assumed

Where I would put my checkpoint in real life

MODULE 6

DISC Stakeholder Communication

Module Objective

Apply the DISC behavioral framework with AI to tailor the same project message for very different stakeholders — and practice adapting to the style that is hardest for you.

Key Ideas

Every PM and BA has had the experience of delivering a perfectly accurate update that landed badly. Usually the facts were not the problem. The shape was.

DISC gives you a fast read on what a given stakeholder needs from you: the bottom line, the relationship, the reassurance, or the data. AI makes it practical, because rewriting the same message four ways used to cost an hour and now costs four minutes.

DISC Quick Reference

Style	Traits	Communication preference	Watch out for
D — Dominance (Steve Jobs)	Results-oriented, decisive, direct	Be brief, lead with outcomes and bottom line	Avoid excessive detail or small talk
I — Influence (Oprah Winfrey)	Enthusiastic, collaborative, optimistic	Be warm, allow brainstorming, recognize their ideas	Avoid being overly rigid or data-heavy upfront
S — Steadiness (Mr. Rogers)	Patient, reliable, team-oriented	Be supportive, provide reassurance, avoid sudden changes	Avoid rushing or pressuring for quick decisions
C — Conscientious (Bill Gates)	Analytical, precise, quality-focused	Provide data, be thorough, allow processing time	Avoid vague claims or skipping details

Why This Matters for Project Work

- Your executive sponsor and your technical lead need the same facts in opposite packaging.
- Bad news lands differently by style — a D wants the impact and the fix, an S wants to know the team is steady.
- Requirements sessions stall when a C's need for detail collides with a D's need to move.
- The style hardest for you to write is usually the stakeholder you have the most friction with.

✎ Activity: DISC-Adapted Project Updates

You will use AI to draft the same project communication four different ways — each tailored to a different DISC style.

Scenario: Your project has slipped three weeks. The cause is a third-party integration dependency outside your team's control. The recovery plan is in place, scope is unchanged, and the new date is firm. You need to communicate this to four different stakeholders.

1. Draft it for a D-style stakeholder (direct, results-focused, bottom-line first).
2. Draft it for an I-style stakeholder (warm, collaborative, relationship-forward).
3. Draft it for an S-style stakeholder (reassuring, steady, team-oriented).
4. Draft it for a C-style stakeholder (data-rich, detailed, process-oriented).

Sample Prompt:

> *"Draft a project update announcing a three-week schedule slip caused by a third-party integration dependency. Recovery plan is in place, scope is unchanged, new date is firm. Tailor the tone for a [D/I/S/C]-style stakeholder. Be [direct and concise / warm and collaborative / reassuring and steady / detailed and data-driven]. Keep it under 150 words. Do not invent dates or numbers I have not given you."*

Your D-Style Draft Notes

Your I-Style Draft Notes

Your S-Style Draft Notes

Your C-Style Draft Notes

✎ Activity: The Difficult Stakeholder Conversation

Now you will use AI to run a simulated conversation with the DISC style that is the diagonal opposite of your own — the one you find hardest.

1. Identify your primary DISC style. If you are split between two, pick your favorite.
2. Find your diagonal opposite (D↔S, I↔C).
3. Set up the scenario: that stakeholder is pushing back on a scope decision you need to hold.
4. Continue the conversation for three to five back-and-forth exchanges. Focus less on winning and more on adapting your style to theirs.
5. Reflect on what felt natural and what felt difficult.

Sample Prompt:

> *"You are a [D/I/S/C]-style stakeholder on my project. This style is the diagonal opposite of mine. I am going to tell you that a requested scope addition cannot make the current release. Respond in character, push back the way that style would, and stay in role. We will go three to five exchanges. Afterward, tell me where my responses did not land well for your style."*

What surprised me about how the conversation went

What I will change when I talk to this stakeholder for real

MODULE 7

Communication & Stakeholder Alignment

Module Objective

Use AI as a fast outside reader — to reveal the gap between what you meant to say and what your audience will actually hear.

Key Ideas

Most of us are not bad communicators. We are just too close to our own words. We know what we meant, so we assume everyone else will know too. AI can be surprisingly useful as a fast outside reader that tells you what your message sounds like from the other side.

If you ask AI "What is your takeaway from this?" you are no longer asking it to praise your writing. You are asking it to reveal the gap between intent and impact.

This is especially useful for PMs and BAs because a lot of the job is not just getting information out. It is getting the right people to understand the right thing, in the right way, at the right level of detail.

Handy Communication Patterns

- Rewrite one update for three audiences: executive sponsor, project team, and client.
- Rewrite a status message in three tones — empathetic, firm, and optimistic — while keeping the facts stable.
- Reword a draft email to be kinder, clearer, or shorter without losing urgency.
- Ask AI what the takeaway is from your message before you send it.

Try These Prompts

"Rewrite this project update three ways: one for my executive sponsor, one for my project team, and one for the client. Keep every fact identical."

"You are an overloaded stakeholder who skims. What do you take away from this message in ten seconds?"

"Where in this message might the tone create friction or unintended meaning?"

✎ Activity: Am I Saying What I Think I'm Saying?

Take one real communication sample: an email, a status update, a requirements summary, or a post. Decide on a target audience and use AI to answer a simple question: what is your takeaway from this?

1. Choose your sample. Remove anything confidential first.
2. Decide who the audience is. Be specific. "Stakeholders" is fuzzy. "Executive sponsor," "client," or "overloaded coworker" is better.
3. Paste your message and use the prompt pattern below.
4. Read the answer and focus on the takeaway and the concerns it identifies.
5. Compare the AI's interpretation with what you meant to communicate.
6. Mark any mismatch in tone, emphasis, clarity, or action.
7. Ask for a revised version if useful, then be ready to discuss what surprised you.

Sample Prompt:

"You are a [target audience / role] reading the message below. What is your main takeaway? What question, concern, or reaction would you have after reading it? Tell me where the tone may create confusion, friction, or unintended meaning. Then suggest a revised version that keeps my original intent but improves clarity and audience fit."

1. My intended audience

2. What I was trying to communicate

3. AI's stated takeaway

4. Questions and concerns AI raised

5. Where the message did not land the way I intended

6. My revision notes — what improved?

MODULE 8

Decision Support

Module Objective

Use AI as a structured thinking partner to evaluate options, identify risks, challenge assumptions, and view a decision from multiple stakeholder perspectives before you commit.

AI as Your Thought Partner

AI can help you think through a problem before you act. It can organize information, compare options, identify trade-offs, surface risks, and help you prepare for decisions or conversations.

The key is to give it enough context and ask it to challenge your thinking, not just confirm your first idea. A model that agrees with everything you say is not helping you.

Try These Prompts

"I'm evaluating two approaches for [problem]. Help me create a pros/cons analysis considering cost, timeline, and delivery risk."

"Help me structure a root cause analysis for [issue] using the 5-Why method."

"What questions should I be asking that I haven't considered yet about [project/decision]?"

AI as an Advisory Board

You can also ask AI to review a decision from several perspectives at once. This is useful when a decision affects multiple groups — the sponsor, the delivery team, the business users, finance, compliance, or the vendor.

Try These Prompts

> *"Act as an advisory board reviewing this decision. Include perspectives from the executive sponsor, the delivery team, business users, finance, and compliance. For each perspective, list the biggest concern, likely question, and recommended next step."*

> *"Review this plan from the perspective of a project manager, a business analyst, a technical lead, and a senior leader. What would each person care about most?"*

✎ Activity: Structured Decision Session

Choose a real project decision you are currently facing, or use the fallback scenario, and use AI as a structured thinking partner.

Fallback scenario: Your team is deciding whether to extend the current release to absorb a late requirement, or hold the date and push it to the next release. Budget is fixed, the sponsor wants both, and the decision affects three downstream teams.

1. Describe the decision to AI with full context.
2. Ask for a decision framework, not an answer.
3. Ask for the advisory board view.
4. Ask it to play devil's advocate on your preferred option.
5. Summarize your decision rationale using its analysis — in your words, not its.

Sample Prompt:

"Here is a decision I need to make: [describe with full context]. Do not recommend an option yet. First give me a decision framework with the criteria that should drive this. Then review it as an advisory board from the perspectives of [list your stakeholders]. Then argue against the option I am leaning toward, which is [option]."

My situation or decision

Key insights worth keeping

Advisory board perspectives — which were most helpful? Do I need to change the board?

Assumptions, risks, or questions to verify

MODULE 9

Accuracy & Verification

Module Objective

Understand where AI output is reliable and where it is not — and build a verification habit that protects your credibility as the person whose name is on the deliverable.

The Verification Mindset

AI is a powerful accelerator, not a replacement for professional judgment. Every output should be reviewed through the lens of your domain expertise. Think of it as a highly capable first-draft generator that requires your expert validation.

For PMs and BAs this matters more than most roles, because your deliverables get acted on. A wrong number in a status report becomes a wrong decision two levels up.

Accuracy Framework

Confidence level	Use cases
HIGH	Summarizing documents you provided • Reformatting and restructuring • Drafting from explicit input • Rewriting for audience or tone
MODERATE	Cross-referencing multiple sources you supplied • Generating templates and frameworks • Identifying patterns in data you gave it • Categorizing and grouping
VERIFY CAREFULLY	Numerical calculations and formulas • Dates, durations, and dependencies • Regulatory, contractual, or compliance references • Anything about your specific organization it was not told • Any claim stated as fact without a source

Your Verification Checklist

- ☐ Did I give the AI accurate and complete source material?
- ☐ Have I verified any numbers, dates, durations, or calculations?
- ☐ Are names, owners, and org details real — not plausible inventions?
- ☐ Have I checked anything it stated as fact but did not source?
- ☐ Have I had a subject matter expert review the critical content?
- ☐ Would I stake my professional reputation on this output as-is?

Strategies for Improving Accuracy

- **Provide more context upfront** — the better the input, the better the output.
- **Ask it to cite sources** or explain its reasoning step by step.
- **Tell it not to invent** — "Do not fill in names, dates, or numbers I have not given you. Mark gaps as [MISSING]."
- **Use iterative prompting** — refine rather than accept first drafts.
- **Break complex requests** into smaller, verifiable steps.
- **Ask it to challenge itself** — "What in this answer is least reliable, and why?"

How will I build verification into my workflow?

MODULE 10

Your Monday Morning AI Plan

Module Objective

Turn today into a habit — one role, one task, one block of time, and an honest read on whether it was worth doing again.

Key Ideas

Small, useful, repeatable. If AI becomes “that interesting thing I learned at a workshop,” it will disappear under your normal workload by Tuesday afternoon.

Four moves: pick a role, pick a task, block time to try it, and reflect on whether it was faster, better, and worth doing again.

Start with one use case close to work you already do. Do not try to become a power user by Friday. Try to become a repeat user by Friday.

Build Your Plan

Step 1: Pick a role for AI this week

Examples: Risk Register Assistant, Executive Summary Generator, Stakeholder Translator, Issue Log Analyst, Requirements Clarifier, Devil's Advocate.

Step 2: Pick one task to hand off

Examples: clean up a risk list, summarize a long thread, rewrite an update for a sponsor, group an issue log, draft meeting follow-ups, pressure-test a decision.

Step 3: Block time to try it

Fifteen minutes. Consider a recurring calendar block so it survives a busy week.

Step 4: Reflect and rate it

Was it faster? Better? Worth doing again?

My Working Rules for Using AI Well

I will use AI for

I will not use AI for

I need to verify

I need to protect

Questions for Follow-Up

Capture anything you want to explore further after today:

Additional Notes

Thank you for participating in Smart Planning with AI.

For questions or follow-up, contact Phil Barth — phil@philbarthspeaks.com | philbarth.com