



No-Fluff AI

How to Find Time & Reduce Friction

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1. AI FIRST DOESN'T MEAN AI ALWAYS

When AI Shines	When You Lead
• Repetitive data tasks • First-draft generation • Pattern recognition • Data cleanup & formatting	• Professional judgment calls • Client relationship nuance • Regulatory interpretation • Ethical considerations

2. RESPONSIBLE USE STILL MATTERS

- Data Privacy: Never paste client PII or confidential financials into public AI tools
- Human in the Loop: Always review AI output before sending!
- Know the Limits: AI matches its training data — today's AI is the dumbest AI you will ever use
- Invest in Your AI: Upgrade for more features and opt out of model training

3. POWERFUL PROMPTING STRATEGIES

The RCTQ Framework for Powerful Prompts

- Role — Tell the AI who it is ("You are a senior tax advisor...")
- Context — Provide background, constraints, and relevant details
- Task — State exactly what output you want, and in what format
- Questions — Ask the AI to clarify before starting (reduces rework)

Chain Prompting

Break complex tasks into a sequence of focused prompts — especially the first time around.

1. Extract — Pull key data from the source document
2. Analyze — Identify patterns, outliers, or risks
3. Draft — Generate a structured memo or summary
4. Refine — Revise for tone, accuracy, and audience

Working With AI to Build Your Prompts

- Treat prompt-building as a collaborative, not one-shot, process
- Use AI to help you refine prompts — especially for repeatable tasks
- At the end of a successful session, ask: "Using all the information we have established, build a prompt I can use to accomplish this task in the future."

4. GETTING YOUR AI TO SOUND MORE LIKE YOU

Custom Instructions

- Establish Context: Set persistent context about your role, industry, and preferences
- Define default output format, length, and industry terminology
- Writing Samples: Feed 2–3 examples of your best writing — AI learns your style
- Have Copilot scan your email to understand who you are and how you communicate
- Audience Profiles: Create presets for Board, team, and client communication
- Adjust formality and detail level per context

5. COPILOT IN EXCEL

- Data Cleanup
- Trend Analysis
- Dashboard Generation
- Sentiment & Narrative

All actions taken directly within your existing workbook! No copy-paste or export required.

6. ORGANIZING YOUR WORK

Projects (ChatGPT) & Notebooks (Copilot)

- ChatGPT Projects: Group related conversations by client or engagement
 - Upload reference files that persist across chats
- Copilot Notebooks: Organize prompts and outputs by workflow type
 - Create living documents that evolve with each use

7. REPEATABLE WORKFLOWS WITH CHATGPT SKILLS

Prompts vs. Skills vs. Custom GPTs

	Prompts	Skills	Custom GPT
Best For	One-off questions & ad-hoc tasks	Repeatable workflows: memos, templates, formatting	Complex ongoing use cases: onboarding, compliance, research
Quality	Varies — depends on how you phrase it	Consistent every time, regardless of who triggers it	Consistent persona, specialized knowledge, tailored behavior
Setup	Type directly into the chat window	Saved prompt with pre-built instructions & formatting rules	Fully configured: instructions, knowledge files, connected tools

8. YOUR AI COWORKER — COPILOT COWORK

- Draft Content: Emails, memos, reports, and admin tasks — first drafts in seconds
- Accelerate Decisions: Research, scenario analysis, and pros/cons on demand
- Takes Action: Works within your apps to make things happen

Copilot Chat vs. Copilot Cowork

	Copilot Chat	Copilot Cowork
Interaction	Single prompt, single response	Describe the outcome — Cowork builds a plan
Scope	Works within one app at a time	Coordinates across Outlook, Teams, Word, Excel, and more
Duration	Instant, one-turn exchanges	Long-running tasks over minutes or hours
Autonomy	You drive every step manually	Executes independently with approval checkpoints
Output	One content piece per prompt	Multiple coordinated deliverables across apps
Context	Limited to what you share in the prompt	Grounded in Work IQ across all M365 data

Top 5 Copilot Cowork Use Cases

1. Calendar Management & Focus Time
2. Meeting Prep & Follow-Up
3. Deep Research & Account Intelligence
4. Cross-App Content Creation
5. Inbox & Communication Triage

9. AI FOR MEETINGS

- Record — Meetings, webinars, client calls — anything worth keeping
- Extract — Pull out the decisions, to-dos, and deadlines
- Summarize — Write it up so people will actually read it
- Distribute — Send the right version to the right people

Pro tip: Use AI to build a standard template for meeting notes so every summary follows the same format — no matter who writes it up.

10. RAPID-FIRE USE CASES — TRY THESE RIGHT AWAY

Delegating First Drafts

- Emails & Correspondence
- Memos & Reports
- Administrative Tasks

Decision Support

- Summarize options with pros and cons for clear, fast recommendations
- Generate best-case, worst-case, and likely-outcome scenario analyses
- Research comparable data and compile benchmarks without manual searching
- Draft polished recommendation memos ready for partner review

Challenging Conversations

- Role-play interviews and performance reviews with AI feedback
- Script tough conversations for delivering bad news or sensitive updates
- Anticipate objections and build counterpoints before the meeting

Learning & Development

- Stay Current — Ask AI to summarize new standards and regulatory updates in plain language
- Turn Notes into Action Items — Scan your notes to find key takeaways and next steps
- Deepen Understanding — Use AI as a Socratic tutor: quizzes, concept explanations, practice scenarios

Quick Wins

- Email triage — Condense long threads into key points and required actions; set inbox rules
- Calendar management — Build buffers between meetings; auto-accept recurring requests
- IT support — Explain your issue for multiple solution options
- Policy & SOP drafting — Generate first drafts from bullet points
- Ideate & brainstorm — Capture lightbulb moments and kernels of thought
- Build faster in PowerPoint — Connect content; let AI build slides, layout, and speaker notes

Stay curious. Find Time. Deliver Value.

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