

AI MYTHS vs. EXECUTION

Back to B.A.S.I.C.S.

Six simple rules for using artificial intelligence well.

AI is the analyst. I'm still the advisor.

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The promise of this AI workshop

- 01** Give AI a task it can help you complete.
- 02** Review and improve the answer AI produces.
- 03** Measure whether AI made that task more useful or faster.

BASICS for artificial intelligence

- B** Bring AI a clear task
- A** Ask AI better questions
- S** Supply AI reliable facts
- I** Inspect AI's answer
- C** Communicate in your voice
- S** Simplify one task with AI

Our AI demonstration: a borrower follow-up

Fictional AI demo: Alex asked about the monthly payment. Your notes contain no agreed follow-up date. Alex has not replied to your last message. Ask AI to help prepare your next conversation using only those facts.

We will write prompts, examine AI output and review it together.

Bring AI a clear task

B

What should AI help me do?

Give AI a specific job, an audience and a useful output. Keep the recommendation with the advisor. A defined task makes the answer easier to judge.

MYTH: AI will figure out what I need.

B / AI prompt and review

WHAT A USEFUL AI ANSWER LOOKS LIKE

Useful AI output identifies the payment question, flags the missing follow-up date and proposes questions. Reject any invented reason for the silence.

Using Alex's notes, identify the unanswered question and draft three questions for my next call. Do not infer why Alex went quiet.

Ask AI better questions

A

What context does AI need?

Treat prompting as a conversation. Let AI ask about missing context, then refine the answer. Add facts you know and label what you still need to confirm.

MYTH: One perfect prompt is all I need.

A / AI prompt and review

WHAT A USEFUL AI ANSWER LOOKS LIKE

Useful AI questions ask what payment information Alex received and whether a call was agreed. Answer only from your notes, then ask for a revised draft.

Before drafting Alex's follow-up, ask me up to three questions. Focus on the stated goal, the information already provided and the next step we actually agreed.

Supply AI reliable facts

S

What evidence can AI use?

Provide relevant sources and dates. Ask AI to separate evidence from assumptions. Check important claims against the source and use only authorized information.

MYTH: A confident AI answer must be accurate.

S / AI prompt and review

WHAT A USEFUL AI ANSWER LOOKS LIKE

Supported: Alex asked about payment. Unknown: Alex's reason for not replying. A claim that Alex chose another lender has no support in these notes.

Use only Alex's supplied notes. Return two lists: facts supported by the notes, and unknowns. Do not invent rates, approvals, savings or intent.

Inspect AI's answer



Where might AI be wrong?

Ask AI to challenge its answer and your assumptions. Read the result yourself. A second AI answer can expose a weakness, but it does not independently verify a claim.

MYTH: If AI agrees with me, my plan is sound.

I / AI prompt and review

WHAT A USEFUL AI ANSWER LOOKS LIKE

AI may suggest confusion or competing priorities as possibilities. Neither is an established fact. The advisor checks the notes and chooses a respectful question.

Challenge my assumption that Alex is not interested. Give two possible alternative explanations, label them as possibilities and suggest one question that would help us learn more.

Communicate in your voice

C

Does this AI draft sound like me?

Use AI to make a real answer clearer. Give it a sample of your voice and a length limit. Preserve the facts, explain why they matter and choose one next step.

MYTH: More AI content automatically means more business.

C / AI prompt and review

WHAT A USEFUL AI ANSWER LOOKS LIKE

Illustrative draft: Hi Alex, you asked about the monthly payment when we spoke. What still needs clarification? Would a short call to walk through your questions be helpful?

Draft Alex's follow-up in under 60 words. Use a warm, direct tone. Mention the payment question and offer a short call. Do not invent urgency or make promises.

Simplify one task with AI

S

Did AI improve the work?

Choose one repeatable task and compare the time before and after AI, including review and correction. Keep the human decision and follow-through in the process.

MYTH: Full automation is the goal.

S / AI prompt and review

WHAT A USEFUL AI ANSWER LOOKS LIKE

AI organizes the recap. You verify the commitments and approve it. If a 30-minute task takes 18 minutes including review, net time saved is 12 minutes. Example only.

From these meeting notes, draft a short recap and list agreed actions, owners and dates. Mark missing details as unconfirmed. Keep proposed actions separate from commitments.

Three practical jobs for AI

- 01** Call review: find unanswered questions in your notes.
- 02** Client education: explain an approved answer simply.
- 03** Meeting recap: organize agreed actions for review.

An AI draft needs your decision

- 01 Does each important claim match the source?
- 02 Did AI add an assumption, promise or commitment?
- 03 Would I stand behind this answer in a client conversation?

Your reusable AI prompt

Help me with [specific task]. My audience is [audience] and the outcome I need is [outcome]. Use this approved context: [facts, sources and dates]. Ask me up to three questions if key information is missing. Separate facts from assumptions. Draft [format and length] in my voice. Identify unsupported claims and give one reason your approach might fail. I will review the answer before using it.

The 10-minute AI lab

- 01** 3 minutes: give AI a task and verified context.
- 02** 4 minutes: generate, challenge and revise the AI answer.
- 03** 3 minutes: review with a partner and log the result.

Four measures of your AI execution

AI tasks reviewed

Completed work with a named reviewer.

AI outputs used

Reviewed output actually put to use.

Correction rate

Share of assessed outputs needing a fix.

Net minutes saved

Before less after, including review.

Your first 30 days using AI

- 01** Week 1: test one AI task and record the time.
- 02** Weeks 2–3: improve the prompt and repeat the review.
- 03** Week 4: compare quality and time, then keep, fix or stop.

One commitment for tomorrow

I will use AI to help me...

One action. A named owner. A date. A way to know it is done.

Before you use an AI answer, check the BASICS

AI is the analyst.
I'm still the advisor.
The judgment stays with me.

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