

Unlocking AI's Real Potential

Advanced Techniques
for Business Productivity



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LEARN MORE



Meet your speaker:

Michael Schreiber, PhD

AI Solutions Architect & Director of Fusion Development, Proactive Technology Management

Michael leads the design and development of generative AI, hyperautomation, and cloud analytics solutions.

Specializing in the architecture of agent-based, AI-driven, end-to-end hyperautomation systems, he drives the creation of cloud-native applications that transform office productivity for enterprises across industry verticals.

Michael ensures Proactive's clients stay at the cutting edge without making themselves bleed unnecessary IT spend, maintaining a competitive advantage through innovative, cost-effective, thoughtful application of artificial intelligence.



Session Agenda

- Introduction
 - Bridging the AI Productivity Gap / Beyond Basic Answers
 - Problem
 - Opportunity
 - Goal
- Think Like an AI Trainer
- Advanced Prompting Techniques
- Real-World Applications:
 - Demo
 - Practical SMB Use Cases
- Conclusions & Next Steps / Q&A



Is ChatGPT Just Giving You Basic Answers?



User Frustration

Many users express frustration when AI tools fail to provide detailed or nuanced responses, leading to dissatisfaction.



Maximizing AI Capabilities

Well-designed prompting strategies improve the quality of AI interactions, enabling more meaningful exchanges.



Beyond Simple Queries

Leverage advanced techniques for more complex tasks & insights.



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Problem: AI Hype vs. Shallow Value



Understanding AI Hype

AI hype often overshadows the practical applications, leading to inflated expectations among businesses. It's essential to recognize the difference.

Shallow Value in Businesses

Many businesses report shallow value from AI investments due to unrealistic expectations and lack of understanding of its capabilities.

Differentiating Value from Noise

To leverage AI effectively, businesses must understand the prompting strategies that will differentiate them from suboptimal users of the technology who obtain inferior results.



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Opportunity: SMBs Can Unlock Real Productivity

Harnessing AI

Small and medium-sized businesses can adopt AI tools to streamline operations and improve decision-making processes.

Enhanced Productivity

Implementing AI solutions can lead to significant improvements in productivity, saving time and resources for SMBs.

Innovation Potential

AI opens new avenues for innovation, helping SMBs develop unique products and services that meet customer needs.



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Goal:

Move From AI User to AI Trainer



Mindset Shift

Transitioning from using AI tools to understanding how to train them is crucial for maximizing their effectiveness.

Unlocking AI's Potential

By actively training AI, you can unlock its true potential and enhance its capabilities for your specific needs.



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Thinking Like an AI Trainer



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AI = Smart Intern Needing Context



AI as an Intern

AI can be viewed as a smart intern that learns and adapts based on the context it is given.



AI Needs Guidance

Just like an intern, AI requires clear guidance to understand tasks and deliver accurate results.



Better Outcomes

Providing the right information and context to AI leads to significantly better outcomes in its tasks.



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Clear Roles & Tasks = Better Results

Importance of Clarity

Clear roles (agent personas) and well-defined tasks (with constraints) eliminate confusion, leading to improved performance and efficiency in AI systems.

Impact on Performance

When AI systems have defined roles and clear tasks, their output quality improves significantly, reducing errors and enhancing results.

Avoiding Ambiguity

Ambiguity in tasks can lead to confusion, hallucination/confabulation (AI making stuff up), and subpar performance, impacting overall project success.



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The background of the slide features a collage of financial data visualizations. On the left, there's a large magnifying glass graphic. Behind it and to the right are various charts: a bar chart at the top left with values 1-6, a horizontal bar chart with percentages (35%, 22%, 33%, 24%, 33%, 26%, 36%, 23%, 37%, 13%), a line chart labeled 'Fig.10' with a peak at 59.8, and another bar chart at the bottom with values like 468, 339, 268, 189, 94, 75, 64, 65, 1,000, and 800.

Contextualization: Use Real Business Data Effectively

Importance of Real Data:

Uploading context-rich business data & documents ensures that AI models are onboarded with relevant and practical information.

Enhanced AI Accuracy

Contextualizing AI agent tasks with real business docs you would use to onboard an employee leads to more relevant output.

Sky is the Limit

Modern LLM models support very large amounts of context in a single request – as much as 1500 pages!



Intern Onboarding vs. Vague Prompt Comparison

Effective Onboarding

Clear and structured onboarding processes enhance the learning experience of AI interns, leading to better performance.

Vague Prompting

Vague prompts can lead to confusion and poor outcomes, affecting the AI intern's ability to learn effectively.

Importance of Clarity

Clarity in training prompts is essential for successful AI onboarding, ensuring the intern understands tasks.



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Demo



Advanced Prompting Techniques



Meta Prompting: AI Helps Design Better Prompts



What is Meta Prompting?

Asking an AI model to help you write a prompt to accomplish a task, rather than asking for the task to be completed directly.



Benefits of AI Assistance

AI is an expert-level "prompt engineer" that can transform a vague or unclear AI prompt into a well-structured, well-formulated one that will generate superior results.



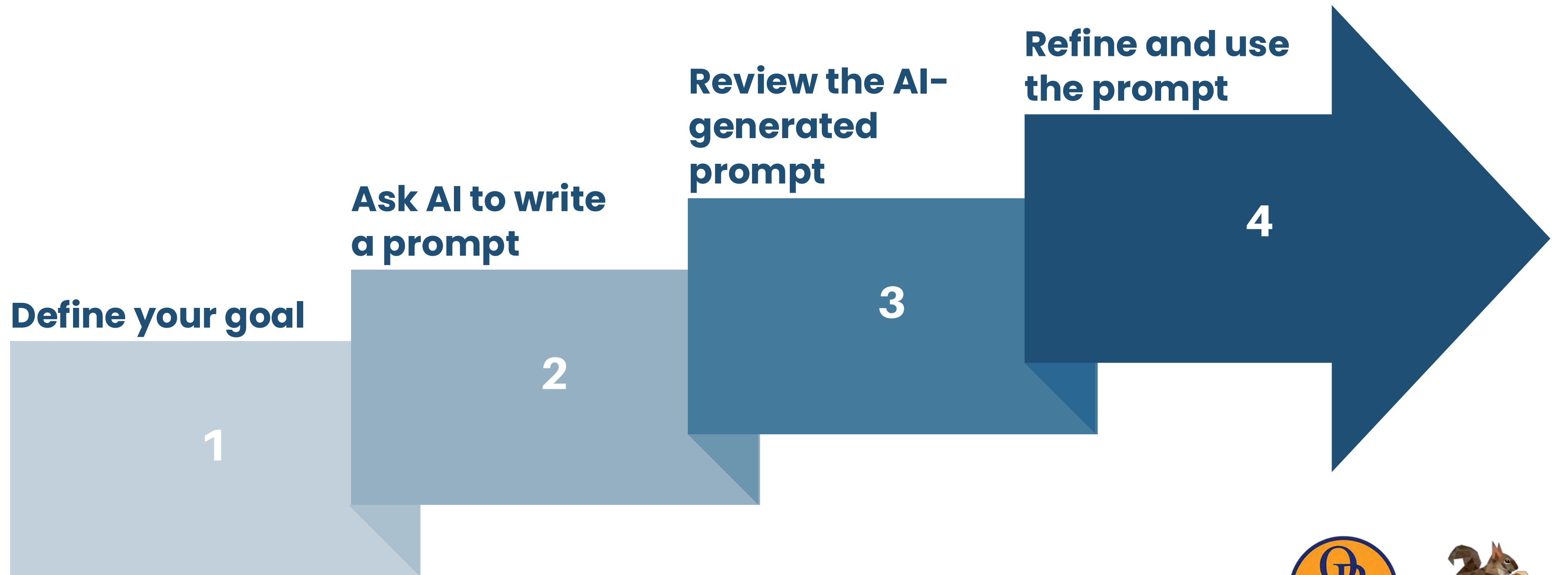
Crafting Better Prompts

AI will analyze provided context and suggest prompt improvements, helping users communicate their needs more clearly.



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Metaprompting: The Prompt Refinement Cycle



Demo



Reverse-Metaprompting: Reflecting on Outputs to Train AI

Reflect on Outputs & Incorporate Feedback

Analyzing particularly successful or flawed AI outputs helps to identify what contributed to the outcome.

Reverse-Metaprompting Improves AI for Next Time

After producing an output with AI, ask the AI how to refine the prompt you used to produce more of the same, or how to avoid a poor result.

Enhance Future Prompts Based on Your Learnings

By incorporating suggested changes into your prompts, you are effectively training the AI based on your experience, just as a new employee improves based on feedback



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Demo



Iteration & Distillation: Refine with Feedback Loops



Importance of Feedback Loops

Feedback loops play an essential role in refining outputs and enhancing the overall quality of results.



Benefits of Iteration

Iteration allows for continuous improvement, fostering the development of more refined and effective results over time.



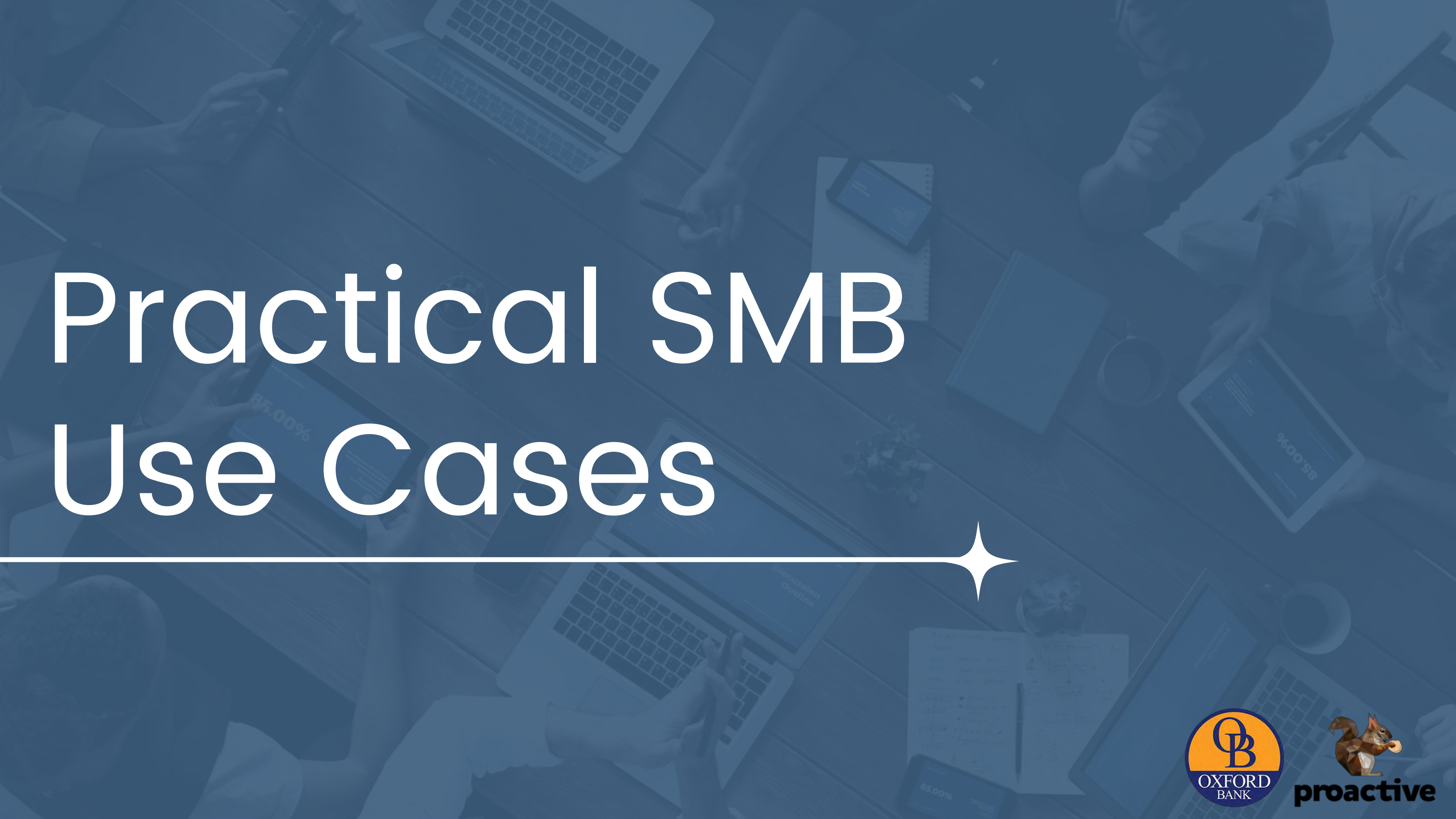
Distillation of Ideas enables AI Learning

Distillation involves using AI to boil down business-specific context, feedback, and prompt/output pairs into instructions for the AI to use next time, enabling self-improvement.



Demo





Practical SMB Use Cases



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Customer Feedback → Service Insights

1

AI Analysis of Feedback

Artificial Intelligence can efficiently analyze large volumes of customer feedback to identify trends and patterns.

2

Data-Driven Decisions

Using insights from feedback analysis, businesses can make informed decisions that enhance their services and products.

3

Enhancing Customer Satisfaction

By implementing insights gained from feedback, businesses can improve customer experiences and overall satisfaction.



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AI-Generated Email Drafts (Compliant + Consistent)

1

Compliance in Messaging

AI-generated email drafts help maintain compliance by adhering to company policies and legal requirements in communication.

2

Consistency in Communication

Using AI ensures that all email communications are uniform, enhancing brand voice and customer trust.

3

Streamlined Processes

AI can automate the drafting process, saving time and reducing the workload on communication teams.



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Demo



Report Summarization (Risk & KPIs)

1

Role of AI in Summarization

AI technology plays a crucial role in efficiently summarizing reports by extracting relevant information and key insights.

2

Highlighting Risks & Reducing Incident Response Time

AI can identify and highlight potential risks or discrepancies within reports, even recommending next-best-actions to aid decision making and reduce incident response times.

3

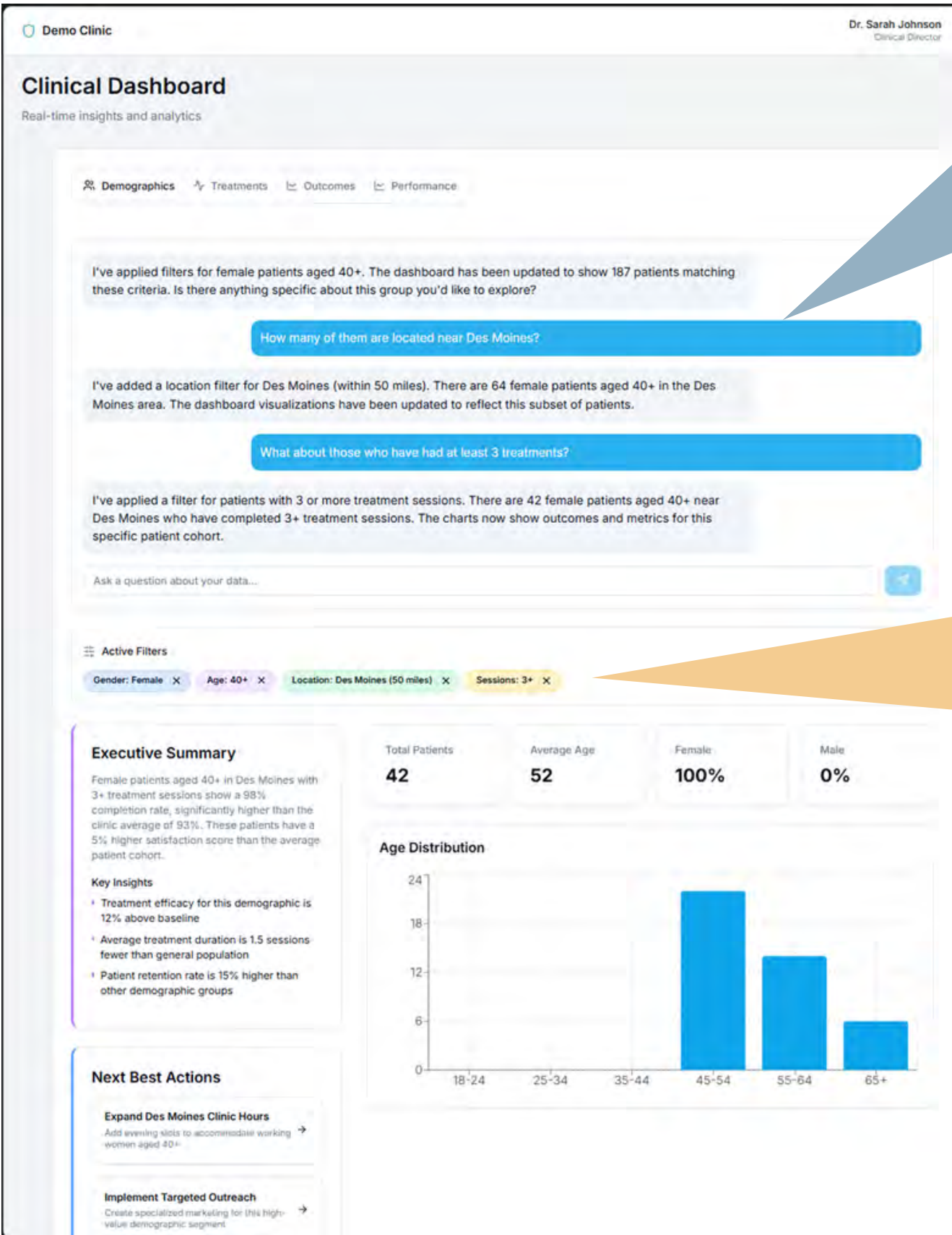
Interpreting & Summarizing Key Performance Indicators

AI helps decision-makers quickly grasp organizational performance and areas for improvement.



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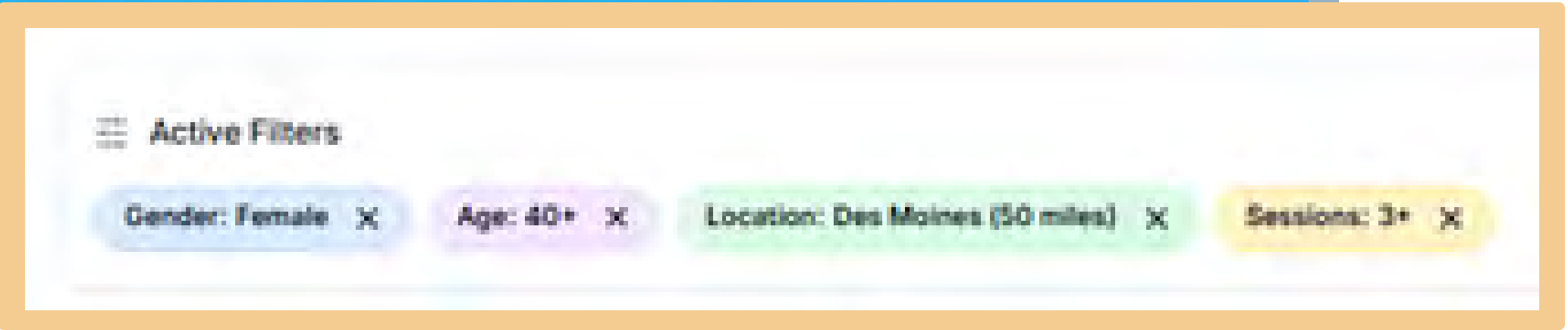
Report Summarization (Risk & KPIs)



How many of them are located near Des Moines?

I've added a location filter for Des Moines (within 50 miles). There are 64 female patients aged 40+ in the Des Moines area. The dashboard visualizations have been updated to reflect this subset of patients.

What about those who have had at least 3 treatments?



AI Chat & Dynamic Filters:
AI understands natural language to instantly refine data, enabling targeted report summarization.

Report Summarization (Risk & KPIs)

Automated Executive Summary: AI automatically interprets & summarizes Key Performance Indicators (KPIs) for the specific patient cohort, highlighting critical insights.

Executive Summary

Female patients aged 40+ in Des Moines with 3+ treatment sessions show a 98% completion rate, significantly higher than the clinic average of 93%. These patients have a 5% higher satisfaction score than the average patient cohort.

Key Insights

- Treatment efficacy for this demographic is 12% above baseline
- Average treatment duration is 1.5 sessions fewer than general population
- Patient retention rate is 15% higher than other demographic groups

Demo Clinic

Clinical Dashboard

Real-time insights and analytics

Demographics Treatments Outcomes Performance

I've applied filters for female patients aged 40+. The dashboard has been updated to show 187 patients matching these criteria. Is there anything specific about this group you'd like to explore?

How many of them are located near Des Moines?

I've added a location filter for Des Moines (within 50 miles). There are 64 female patients aged 40+ in the Des Moines area. The dashboard visualizations have been updated to reflect this subset of patients.

What about those who have had at least 3 treatments?

I've applied a filter for patients with 3 or more treatment sessions. There are 42 female patients in Des Moines who have completed 3+ treatment sessions. The charts now show only this specific patient cohort.

Ask a question about your data...

Active Filters

Gender: Female X Age: 40+ X Location: Des Moines X Sessions: 3+ X

Executive Summary

Female patients aged 40+ in Des Moines with 3+ treatment sessions show a 98% completion rate, significantly higher than the clinic average of 93%. These patients have a 5% higher satisfaction score than the average patient cohort.

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Next Best Actions

Expand Des Moines Clinic Hours

Add evening slots to accommodate working women aged 40+ →

Implement Targeted Outreach

Create specialized marketing for this high-value demographic segment →

Total Patients

42

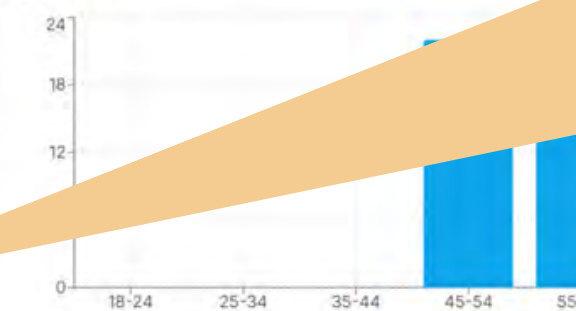
Average Age

52

Female

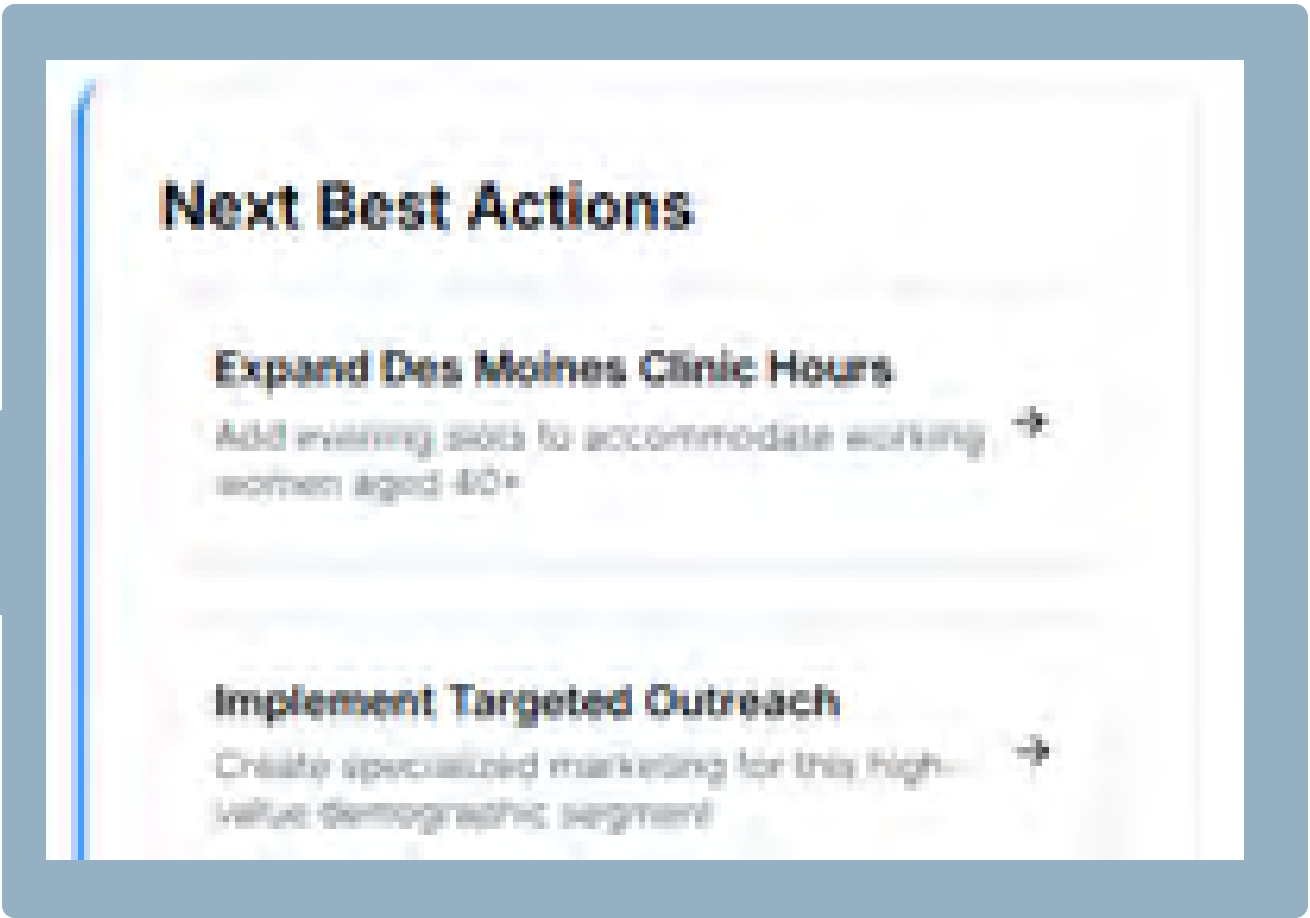
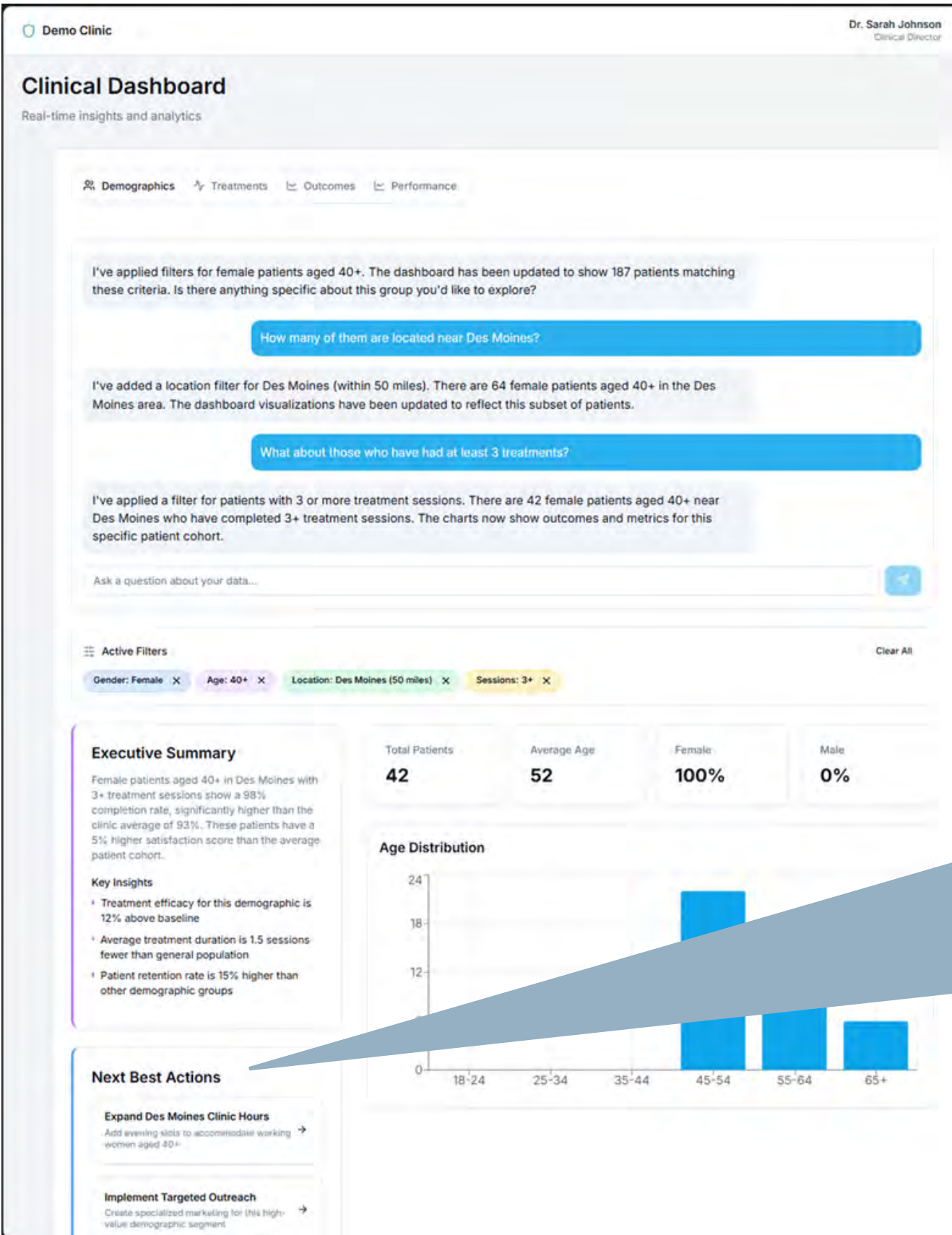
100%

Age Distribution



Report Summarization (Risk & KPIs)

AI-Recommended "Next Best Actions":
AI proactively suggests data-driven actions, helping to highlight risks/opportunities and reduce incident response time.



Dictation to Prompt Workflow



Dictate Stream of Thought

Brainstorm directly into an AI chatbot's voice interface to reduce friction when starting a new creative task.



Transcribe and Refine

- The AI will transcribe your conversation and its responses.
- Ask for a summary at the end to copy-and-paste to use with a task-specific LLM prompt.



Iterate on AI Output

Review and refine the output from the AI by asking for needed revisions.



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Conclusion



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Recap Key Ideas:

Train, Contextualize, Iterate

✦ **Coaching & Training AI Models**

Treat your AI models like fresh interns who must be onboarded, supervised, and corrected.

✦ **Effective Data Contextualization**

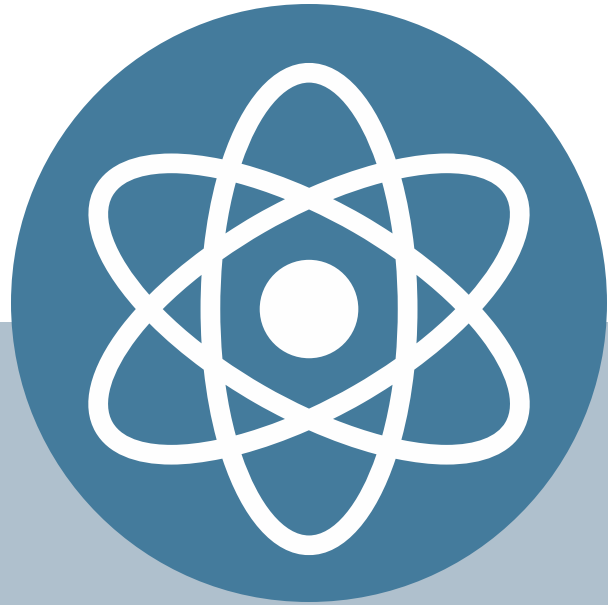
Contextualizing data (such as uploaded files and reference material) enables AI to understand & process information in a more relevant and meaningful way.

✦ **Iterative Prompt Development**

Iterating on your prompts and AI responses helps refine the output of your AI efforts, leading to better and better results!



Proactive's Approach: Organizational Digital Wellness



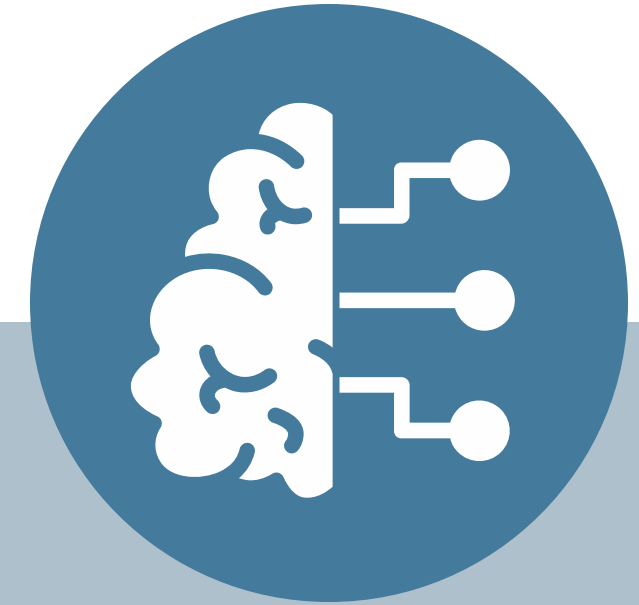
Data (Soul)

Organized and well-catalogued data made accessible serves as the foundation and essence of any business, driving decisions and strategies.



Automation (Body)

IT automation provides the operational backbone, eliminating silos, streamlining processes, and enhancing efficiency across functions.



AI (Mind)

AI acts as the cognitive engine, powering predictive analytics that drive decision-making to promote growth and reduce risk.



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Q&A / Learn More:



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