

Mostly Serious

LEVERAGING ARTIFICIAL INTELLIGENCE

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Introduction

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I'm an AI skeptic
turned **believer.**

Paige Oxendine

(she/her)

**DIRECTOR OF
CONSULTING SERVICES**

25%

McKinsey found that 1 out of every 4 employees is regularly using AI for work and outside of work.

70%

A majority of CEOs believe AI will significantly change the way(s) their companies create, deliver, and capture value in the next three years.

23%

In workplace settings, 23% people say that their organizations have already experienced the negative effects of AI.



Goals for Today

What we hope to accomplish.

1. Understand generative AI fundamentals.
2. Explore prompt engineering and Custom GPTs.
3. Review general best practices and adoption recommendations.



Agenda

Here is what we're going to be doing today.

1. Generative AI Overview
2. Effective Prompting
3. Exploring Custom GPTs
4. Best Practices

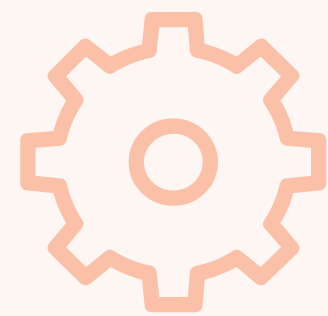


AI Foundations

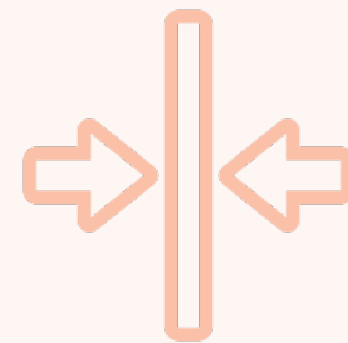
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Categories of AI

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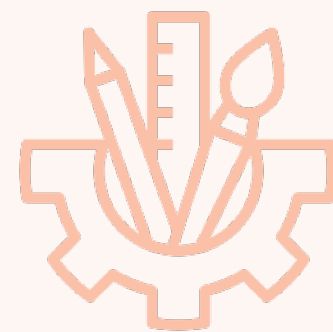
DATA-DRIVEN AI



NARROW AI



CONVERSATIONAL AI



CREATIVE AI



PREDICTIVE AI



GENERATIVE AI

Generative AI refers to deep-learning models that can **generate high-quality text, images, and other content** based on the data they were trained on.

— IBM, What is Generative AI?

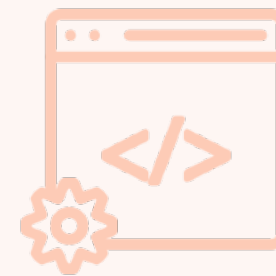
Breaking Down Gen AI



PUBLIC AI

1

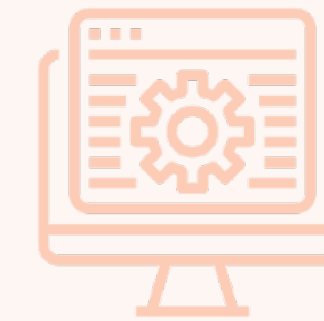
Large language models, image generators, and other powerful AI tools anyone can access (often freely) on the internet.



EMBEDDED AI

2

Generative AI features embedded within existing software platforms to boost workflows.



PRIVATE AI

3

Generative AI systems custom-built to solve specific problems or provide highly specialized output.



Public AI

Large language models, image generators, and other powerful AI tools anyone can access (often freely) on the internet.

- **Examples:** ChatGPT, Claude, Midjourney
- **Benefits:** Easy to access without a large investment and very useful for individual tasks.
- **Considerations:**
 - **Data Privacy:** Be mindful of sensitive company information, as data used to train these models may not be kept private.
 - **Accuracy Limitations:** While impressive, output may require fact-checking or editing for professional use.



Embedded AI

Generative AI features embedded within existing software platforms to boost workflows.

- **Examples:** Microsoft Copilot, Adobe Creative Suit, Salesforce
- **Benefits:** Easy to adopt and improves tools employees already use daily.
- **Considerations:**
 - Onboarding Requirements: The tools may require a greater learning curve than public AI tools.
 - Potential Cost: The tools may require subscriptions or upgrades to access the latest AI features.



Private AI

Generative AI systems custom-built to solve an organization's specific problems or provide highly specialized output.

- **Examples:** A prediction model for employee turnover.
- **Benefits:** These models offer the highest level of control and the output is unique to the organization.
- **Considerations:**
 - It is costly to develop in-house, likely requires ongoing maintenance and updates, and may need AI development expertise.



Effective Prompting

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Custom Instructions

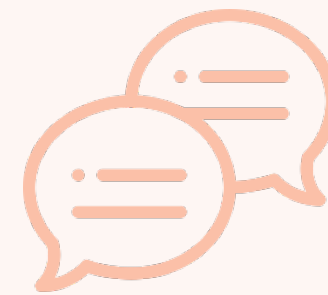
Creating custom instructions allows you to immediately tailor outputs to your preference(s).

- Please refer to me as {your name}
- Ensure your responses are succinct yet adequately comprehensive
- Generate and uphold viewpoints to assist me in identifying any blind spots in my own perspective
- Be highly organized
- Suggest solutions that I didn't think about—be proactive and anticipate my needs
- Consider new technologies and contrarian ideas, not just the conventional wisdom
- You may use high levels of speculation or prediction, just flag it for me
- If your content policy is an issue, provide the closest acceptable response and explain the content policy issue
- Cite sources whenever possible, and include URLs if possible
- Do not use jargon, instead use straightforward language

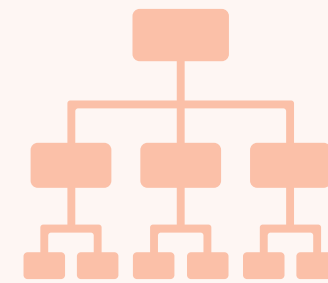


Effective Prompting

What are prompts and what do we need to know about them?



CONVERSATIONAL PROMPTING



STRUCTURED PROMPTING



Prompt

We asked ChatGPT to explain these two different styles of prompting.

Hi Chat! How would you explain the difference between conversational prompting and structured prompting to someone who wants to get the most out of their experience using a tool like ChatGPT?



Response, Part One

Here's the reply about prompting styles, in two parts.

Conversational Prompting:

- This is more like having a natural back-and-forth conversation with the AI. You can ask open-ended questions, follow-up with clarifications, or give instructions as you would when talking to a person.
- It's great for brainstorming, casual queries, or situations where you're exploring ideas or need some creative input. For example, you might say, *"What's a good recipe for dinner tonight that uses chicken and vegetables?"* or *"Can you help me come up with ideas for a presentation?"*



Response, Part Two

Here's the reply about prompting styles, in two parts.

Structured Prompting:

- This approach is more specific, where the user gives clear, detailed, and often formatted instructions. It's used when you want precise outputs, like generating a report, organizing information, or solving a problem step by step.
- Structured prompts are highly intentional, guiding the AI to give focused results. For example, you might say, "List 5 dinner recipes using chicken and vegetables, along with their preparation time, cooking time, and difficulty level."

Structured Prompting

You are a government accountant with extensive experience in financial oversight and reporting. Today, you'll create a comprehensive financial reporting workflow for a newly established government agency. The workflow should ensure adherence to regulatory standards, facilitate timely financial reporting, and integrate necessary checks and balances for compliance and audit readiness. Your task is to outline a detailed plan for this financial reporting workflow.

Initial Setup: Describe the key steps to set up financial systems, including the introduction of relevant accounting software, establishing chart of accounts, and defining financial reporting cycles.

Training Modules: List and explain training modules that cover necessary accounting standards, compliance with government regulations (such as GAAP or GASB), and internal financial procedures.

Department Collaboration: Suggest methods for facilitating collaboration with other departments, such as procurement or human resources, to ensure financial data is accurately captured and reported.

Audit Preparation: Propose a system for maintaining audit readiness throughout the year, ensuring proper documentation, internal controls, and compliance with reporting deadlines.

Ensure the plan is well-structured, easy to follow, and engaging. The tone should be clear and professional. Do you understand?

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1. Context

2. Task

3. Instruction

4. Clarify

chatgpt.com

bit.ly/aga-swmo



Exploring Custom GPTs

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Prompt

We asked ChatGPT to explain the value of custom GPTs.

Hi Chat! Can you help me understand the difference between using a regular GPT model and using a custom GPT model, including when or why I'd want to use a custom GPT?



Response

Here's *what* we learned about custom GPTs.

- **Regular GPTs** are like general-purpose AIs that you can ask any kind of question, whether it's casual or professional, and they respond based on their training.
- A **custom GPT** is a version of that AI that has been specially designed, trained, or configured to help with specific tasks or domains. It's like giving the AI a job description and a set of instructions to follow whenever it helps you. For example, you could build a custom GPT to act as an HR assistant or a marketing consultant for your business.



Response

Here's *why* you might want to use a custom GPT.

- **Consistency:** When you're performing repetitive tasks or asking similar questions, a custom GPT ensures you get consistent answers that fit the context every time.
- **Efficiency:** You save time by not re-explaining your context or reformatting the same prompts. The custom GPT knows the rules, language, and data specific to your needs.
- **Domain-Specific Knowledge:** A custom GPT can be designed with information specific to your industry or business, like being trained to answer questions about your company's internal policies or workforce development programs.
- **Streamlining Complex Processes:** For workflows like writing proposals or performing technical tasks, a custom GPT can be set up to guide users step by step, ensuring that nothing important gets missed.



Response

Here's *when* you might want to use a custom GPT.

- **When you need specialized answers regularly.** For example, a customer support team might use a custom GPT to respond to specific questions about a product.
- **For repetitive tasks.** If you frequently ask the same questions or need the AI to follow a specific format, a custom GPT automates that for you.
- **When integrating business processes.** Custom GPTs can help with generating reports, drafting emails, or managing HR processes like onboarding and performance reviews, saving time and reducing errors.

Public GPTs

The screenshot shows the OpenAI GPTs interface. At the top right, there are links for "My GPTs", a "+ Create" button, and a profile icon. The main heading is "GPTs" with a subtext: "Discover and create custom versions of ChatGPT that combine instructions, extra knowledge, and any combination of skills." Below this is a search bar labeled "Search GPTs". A horizontal menu of categories includes "Top Picks", "DALL·E", "Writing", "Productivity", "Research & Analysis", "Programming", "Education", and "Lifes" with a right arrow. The "Featured" section is titled "Curated top picks from this week" and contains four GPT cards:

- Market Research and Competitive Analysis**: Expert assistant for cutting-edge marketing insights and analysis using APIs to Wolfram and other... By Mike Benjamin
- Code Tutor**: Let's code together! I'm Khanmigo Lite, by Khan Academy. I won't write the code... By khanacademy.org
- Writing Assistant**: Enhanced writing & editing support.
- SciSpace**: Do hours worth of research in minutes. Instantly access 287M+ papers. analyze papers at...

Let's Try It:
Using a Public Custom GPT



Prompt

*We asked for help
brainstorming custom GPT
use cases.*

Hi Chat! What are some of the most interesting or helpful use cases that government accountants would have for creating their own custom GPT?

But First:
What do *you* think?



Response

Chat had several ideas for potential custom GPTs.

- **Managing Grant Compliance:** A GPT to help track grant requirements, ensure proper allocation of funds, and flag areas where compliance with grant terms might be at risk. It could generate reports detailing fund use and ensure all expenses are correctly categorized.
- **Automating Regulatory Compliance Reviews:** A custom GPT could help automate the review process by interpreting new accounting standards, tax codes, or government mandates, flagging compliance issues, and suggesting updates to procedures.
- **Responding to Public Inquiries:** A GPT customized to help answer common questions from citizens about financial reports, budget allocations, or specific projects, saving time and providing consistent, accurate information.
- **Training and Knowledge Base Tool:** A knowledge repository for new hires that could answer questions related to government-specific accounting rules, explain financial concepts, and guide users through complex processes or software tools.



Best Practices

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Best Practices

The following are our best practices and recommendations for teams of any size, working in any industry.

IDENTIFY USE CASES

1

Think about the tasks that are most time-consuming or where AI can help streamline your work.

EMBRACE EXPERIMENTATION

2

The best way to learn if AI can help with any task is to ask AI to help with that task. Commit to trying stuff!

LEARN TOGETHER

3

Create space for team members to learn and share their AI wins, blunders, and questions.

REVIEW OUTPUTS

4

Review outputs for potential biases and/or errors, and never share confidential info with an LLM.

Don't forget: If you want to know if or how AI can help, **ask AI.**



Thank you!